

# BIRD Foundation Kick-Off Meeting

## January 2024

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Israel-United States Binational Industrial Research and Development Foundation

[www.birdf.com](http://www.birdf.com)

# BIRD Foundation Kick-Off Meeting

## January 14, 2024

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### Agenda

09:30 am - 10:00 am	Breakfast and Networking
10:00 am - 10:30 am	Welcome and Introductions
10:30 am - 11:15 am	How to work with BIRD
11:15 am - 12:00 pm	<b>Panel Discussions with BIRD Grantees:</b> Shai Newman, CEO, SkillReal Ofir Paldi, CEO, Shamaym



# BIRD Foundation Staff

Headquarters - Israel 		Jaron Lotan Executive Director <a href="mailto:jaron@birdf.com">jaron@birdf.com</a>		U.S. Offices 	
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				<b>East Coast &amp; Midwest (New Jersey)</b> <b>Andrea Yonah</b> Director of Business Development <a href="mailto:andreay@birdf.com">andreay@birdf.com</a>	
				<b>South (Texas)</b> <b>Anat Ben Yosef</b> Director of Business Development Energy Center U.S. Coordinator <a href="mailto:by.anat@birdf.com">by.anat@birdf.com</a>	

# Approved Projects



BIRD Ref. #	IS Company	U.S. Company	PBC*	IS Representative
1843	Celleste Bio	Mondelez International	LNv	Ms. Michal Beressi Golomb, CEO Dr. Hanne Volpin, CTO
1844	CENS Materials	LiCAP	LNv	Mr. Moshe Johary, CEO
1847	Diptera.ai	Vectech	OC	Dr. Elly Ordan, CSO Dr. Noa Dahan, Sr. Scientist and Project Mngr.
1850	Greatnix (Opmed)	Mayo Clinic	LNv	Prof. Baruch Barzel, CSO Mr. Avi Paz, Co Founder and CTO
1851	Hypervision	Light Polymers	TK	Dr. Arthur Rabner, CEO
1852	IAI	MELD PrintWorks	OC	Mr. Shai Essel, Head of Metallurgical Dept.
1853	Imagindairy	Ginkgo Bioworks	LNv	Ms. Roni Zidon-Eyal, VP BD
1854	LahakX	Aero Systems West	TK	Mr. Eylon Sorek, Founder and CEO
1862	The Sheba Medical Center	Serpin Pharma	OC	Prof. Dror Harats, VP R&D Dr. Michaela Smilovici Ofir, Research Grants Dir.
1863	Tissue Dynamics	ATCC	OC	Mr. Amir Dagan, CEO Mr. Avner Ehrlich, EVP R&D

\* Primary BIRD Contact

# Approved Projects

## BIRD Energy



BIRD Ref. #	IS Company	U.S. Company	PBC*	IS Representative
7155	AIR VEV	Nidec Motor Corporation	TK	Mr. Rani Plaut, CEO Mr. Hagai Plotkin, VP Finance Mr. Netanel Goldberg, COO
7165	Apollo Power (SolarPaint)	Lippert Components	TK	Mr. Elad Sharabi, CBO Mrs. Yael Holzberg, Automotive Client Mngr.
7156	BIRAD	Forge Nano	LVN	Prof. Malachi Noked Dr. Ortal Shalev, Postdoc
7157	Boson Energy	Drexel University	LVN	Mr. Liran Dor, CEO Ms. Esther Bakalnik, CFO
7158	Carbon Blue	Energy & Environmental Research Center	OC	Dr. Dan Deviri, Co Founder and CEO Mr. Iddo Tsur, Co Founder and COO
7159	Groundwork BioAg	Verdesian Life Sciences U.S.	LVN	Mr. Guy Adler, Global Products Manager
7162	PowerPlug	Cirrus Nexus	LVN	Mr. Eyal Yechieli, CEO Mr. Nimrod Yedaya, VP Customer Services
7166	Trigo Solar	Texas A&M Agrilife- Research Extension	OC	Mr. Asaf Maman, CEO Mr. Avi Elkayam, Director
7167	WindStore	NPS Solutions	LVN	Mr. Gadi Hareli, CEO

\* Primary BIRD Contact

## BIRD HLS



BIRD Ref. #	IS Company	U.S. Company	PBC*	IS Representative
3062	NeuralGuard	Point Security	OC	Mr. Hezki Malachi, Co-founder & CEO Mr. Raviv Pavel, Co-founder & CTO
3063	NextVision	Data Blanket	OC	Mr. Chen Golan, Chairman
3067	Validit Evaluation Solutions	Inspire Labs (Silverstein Properties)	TK	Ms. Avivit Yorkevich, CEO Mr. Yossi Penias, COO

 **ENERGY.GOV**

Department of Energy

## BIRD Energy to Invest \$9.75 Million in Cooperative U.S.-Israel Clean Energy Projects

**THE JERUSALEM POST**

ISRAEL NEWS HEALTH & WELLNESS WORLD NEWS

### BIRD fuels US-Israel clean energy initiative with \$9.75m. investment

The projects include a company or research institute from Israel and one from the United States.

By MAAYAN JAFFE-HOFFMAN

JANUARY 2, 2024 18:47 **Updated:** JANUARY 2, 2024 19:05

**CTECH**

by **CALCALIST**

24/7 Buzz Startups VC AI Innovation Opinions

Homepage > News



### BIRD Energy invests \$9.75 million in Israel-U.S clean energy projects

"Strengthening technology cooperation between the U.S. and Israel is more important than ever," said Jaron Lotan, Executive Director at BIRD Foundation.

James Spiro 13:32, 01.01.24

TAGS: [BIRD Foundation](#) [BIRD Energy](#) [USA](#)

**ice.** הנבחרת השוק תקשורת ומדיה נדל"ן שיווק ופרסום דיגיטל וטק

## בירד אנרגיה תשקיע בפרויקטים משותפים לישראל-ארה"ב: הסכום המטורף נחשף

רה"ב בתחום האנרגיה הנקייה, סר

יום רביעי, כ"ט טבת התשפ"ד  
10.01.2024

## ISRAEL DEFENSE

Nid  
מליים למטוסי

קעה בתשעה פרויקטים, כולל

**New-Tech Magazine**

2024, 1 ינואר - New-Tech Magazine Latest News

## תוכנית בירד אנרגיה תשקיע 9.75 מיליון דולר בפרויקטים משותפים לישראל-ארה"ב בתחום האנרגיה הנקייה

בית « Latest News » תוכנית בירד אנרגיה תשקיע 9.75 מיליון דולר בפרויקטים משותפים לישראל-ארה"ב בתחום האנרגיה הנקייה

סך ההשקעה בפרויקטים, כולל השקעה מהמגזר הפרטי, הוא 27 מיליון דולר. הפרויקטים יתמקדו בתחומי אנרגיה סולרית, אגירת אנרגיה, הפחתת פליטות פחמן, התייעלות אנרגטית וסוללות

**TechTime**  
Electronics & Technology News

חדשות ▾ שבבים תעופה וביטחון ייצור Podcast אודות English טכנולוגיה בחסות אבנט

## קרן בירד אנרגיה תשקיע 9.75 מיליון דולר ב-9 מיזמי פיתוח ישראליים-אמריקאיים

1 ינואר, 2024

בין הפרויקטים שיזכו למימון: סוכך סולארי, מנוע חשמלי למטוסי eVTOL, מערכת לצמצום הזיהום מחוות שרתים, קיבוע פחמן דו-חמצני בקרקע ועוד





# BIRD Foundation

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Israel-United States Binational Industrial Research and Development Foundation

# Cooperation and Project Funding Agreement (CPFA)

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- ◆ A trilateral agreement between BIRD and the two participants
- ◆ CPFA is a standard agreement (see BIRD's site)
- ◆ Main sections of the CPFA:
  - Terms of the conditional grant – section F
  - Grant payment milestones – Annex B
  - Reporting commitments during the project - section C
  - Budgets of both Participants – Annex A
  - Project start date; Milestones -Annex E
  - Grant repayment terms – sections F, G
  - Product Description – Annex F
  - Milestone Description (specific CPFAs) – Annex G

# Steps towards signing the CPFA

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- ◆ **Bilateral agreement between the two companies** - a draft for BIRD to review prior to signing
- ◆ **Financial Status Analysis** - private companies only, substantiate matching funds
- ◆ **Adjust budgets** - Should equal twice the approved grant, same as original ratio
- ◆ **Adjust Program Plan (Gantt) and Milestone and Deliverables** – Reflect project start date (“Effective Date”)
- ◆ **Missing additional details** - as instructed in the letter

CPFA is sent to the companies for signatures

BIRD is last to sign

BIRD executes first grant payment to each company

## Annex B - Payment of Conditional Grant

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- ◆ First payment upon signing of the CPFA, an advance toward the first segment
- ◆ The cumulative level of expenditure should reach a trigger amount
- ◆ Accepted expenses different from reported expenses
- ◆ Each payment is an advance toward the next segment
- ◆ A payment may be postponed to the next segment

## Annex B – example 12 month project

<b>1. First Payment - On signing</b>	Israeli Company	\$100,000
	U.S. Company	\$120,000

### **2. Second Payment -**

After receipt and approval of the first interim technical and fiscal reports for the first 6 month period, or after actual expenditures on the project have equaled or exceeded the required expenditure, whichever is later.

	Required Expenditure	Payment
Israeli Company	\$260,000	\$250,000
U.S. Company	\$310,000	\$350,000

- 3. Final Payment -** After receipt and approval of the final technical and fiscal reports - the balance due to the Proposer up to the total sum of the Conditional Grant in accordance with Section B.1.

Annex E

Schedule of Project Milestones & Deliverables

#	Milestone Definition / Description and How It is Measured	Milestone Date (MM/YY)
1		
2		
3		
4		
5		
#	Deliverable Definition & Description	Deliverable Date (MM/YY)
1		
2		
3		[end of project]

# Reporting Requirements (section C)

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- ◆ Interim set of reports – a Fiscal Report from each company and a joint Technical Report  
  
Full set of interim reports should be submitted within 30 days from end of segment
- ◆ Final set of reports – in addition to an interim set, should include Technical Report Part II (a marketing report)  
  
A full set of final reports should be submitted within 60 days from end of project
- ◆ Reports uploaded to BIRD's site
- ◆ Late submission of the reports is a fundamental breach of the CPFA



# Monitor and Review of reports

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- ◆ Review after all three reports are uploaded
- ◆ Technical report is reviewed by project's PBC
- ◆ Fiscal reports are reviewed by the Finance team
- ◆ A cross check between expenditure in the segment and the progress of tasks
- ◆ A recommendation to request an extension of the project or a budget revision may be advised by BIRD or initiated by the companies

Those requests should be submitted no later than 3 months prior to project completion

# Variation from Budget

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- Allowed up to 15% variation in any budget item
- For variation greater than 15% or when no budget item:
  - ◆ can recognize against underspending on other items
  - ◆ Submit written request for budget revision
  - ◆ Explain the requested changes
  - ◆ submit new budget giving effect to the requested changes
- For changes that result in a different allocation of tasks between companies
  - ◆ same procedure with a request from both companies

**Requests for budget modification should be submitted  
at least 3 months prior to Termination of Project**

# Example

## Allowances when No Budget Revision was requested

	<u>Original</u> <u>Budget</u>	<u>Actual</u> <u>Expenses</u>	<u>Recognizable</u>
Direct Labor (incl. 25% Overhead)	500,000	450,000	450,000
Materials	100,000	80,000	80,000
Foreign Travel	10,000	20,000	11,500
Subcontractors	50,000	70,000	57,500
Consultants	_____	<u>45,000</u>	_____
	660,000	665,000	599,000
G&A – 5%	<u>33,000</u>	<u>33,250</u>	<u>29,950</u>
<b>TOTAL</b>	<b><u>693,000</u></b>	<b><u>698,250</u></b>	<b><u>628,950</u></b>

## Project Financing & Repayments (sections F, G)

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- ◆ Commercial Product – an incorporation of the Product (direct outcome of the development work or any indirect derivative thereof) into a commercial product that can be sold alone or in conjunction with other products
- ◆ The CPFA defines Full Repayment – a repayment of the entire obligation, as adjusted over time
- ◆ Actual repayments are triggered by several events:
  - Commercialization of the Product
  - Outright Sale of the product
  - Transfer of Control of a participant or IPO

# Repayments to BIRD

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- ◆ Repayments derived from Gross Sales at a rate of 5%
- ◆ Change of Control – need to receive approval from BIRD and commit to continue the Program Plan or commercialization efforts
- ◆ Outright Sale – transfer of ownership of Intellectual Property or technology related to Product requires a prior approval from BIRD. It is considered a Repayment Event triggering a Full Repayment of up to 50% of proceeds in the transaction

# BIRD Foundation

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## Technical Reports



Israel-United States Binational Industrial Research and Development Foundation

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# Project Plan – Final Touch

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- **Budget revisions - Project Plan revisions**
- **Project Plan – Proposal version Vs. Real-Life version – Partners agreement and understanding**
- **Effective-Date adjustments**
- **Annex E adjustments**

- **Understanding project significance for your partner**
- **Cultural awareness and skill diversity**
- **Effective relationship management**
- **Formal and informal relationships**

**Cooperation between the companies is vital for the project's success**  
**The Technical Reports are a vital part of this framework**



# Reporting Objectives

Objectives: Transparency, Accountability, Decision Making, Communication, Evaluation

- Monitor project progress. Actual Vs. Planned
- Put us all (also the partners) on the same page
- Assist you in making better decisions

## Potential Gains:

- Identify delays – Project extension
- Optimize your grant utilization

**We want you to succeed**



# Documents on BIRD's Website

Guidelines & Forms → Fiscal & Technical Meetings

The screenshot displays the BIRD Foundation website. At the top, there is a banner for the "BIRD Foundation Call for Proposals" with a deadline of "March 7, 2024". The navigation bar includes links for Home, About, Guidelines & Forms, News & Events, BIRD Energy, ENERGY CENTER, BIRD HLS, BIRD Cyber, and Contact. A search bar is located on the right side of the navigation bar. The "Guidelines & Forms" menu is open, showing a list of options: Deadlines, BIRD Call for Proposals, Procedures & Submission Forms, Agreements, Upload System, Reporting Upload System, Fiscal & Technical Meetings (highlighted with a red circle), and FAQ's. On the right side of the page, there are three large buttons: "About BIRD", "Call For Proposals", and "Deadlines". A YouTube logo is visible in the bottom center of the page.

# Documents on BIRD's Website

Guidelines & Forms → Procedures & Submission Forms

The screenshot displays the BIRD Foundation website. At the top, there is a banner for the "BIRD Foundation Call for Proposals" with a deadline of March 7, 2024. The navigation bar includes links for Home, About, Guidelines&Forms, News&Events, BIRD Energy, ENERGY CENTER, BIRD HLS, BIRD Cyber, and Contact. A dropdown menu is open under "Guidelines&Forms", listing several options: Deadlines, BIRD Call for Proposals, Procedures & Submission Forms (which is circled in red), Agreements, Upload System, Reporting Upload System, Fiscal & Technical Meetings, and FAQ's. On the right side of the page, there are three large buttons labeled "About BIRD", "Call For Proposals", and "Deadlines".

Guidelines & Forms → Procedures & Submission Forms → Reporting Procedures & Forms



**BIRD Foundation  
Call for Proposals**  
Deadline: March 7, 2024





**BIRD**  
Israel-U.S.  
Binational Industrial Research  
and Development Foundation

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## Procedures & Submission Forms

- Deadlines
- BIRD Call for Proposals
- Procedures & Submission Forms
- Agreements
- Upload System
- Reporting Upload System
- Fiscal & Technical Meetings
- FAQ's

## Guidelines&Forms

### Procedures & Submission Forms

- [Submission Forms](#)
- [Agreements \(CDA/NDA, CPFA\)](#)
- [Reporting Procedures & Forms](#)

## Guidelines&Forms

### BIRD Reporting Forms

- ◆ General Guidelines
- ◆ Interim Report
- ◆ Final Report
- ◆ Following Completion Reports
- ◆ Project Extension Request

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[Submission Forms](#)

## Guidelines&Forms

### Reporting Procedures and Forms

#### Reporting Guidelines

Report Formats ([pdf](#))

#### Interim Report

Interim Technical Report Template ([docx](#))  
Fiscal Report ([xls](#))

#### Final Report

a. Final Technical Report Template- Part I ([docx](#))  
b. Final Technical Report Template- Part II ([xlsx](#))  
**Explanations to Part II** ([YouTube](#))  
c. Fiscal Report ([xls](#))

#### Following Completion Reports

Commercialization Report ([pdf](#))  
Pharma Project Milestone Report ([pdf](#))

#### Project Extension

Extension Request Guidelines ([pdf](#))  
Extension Request Form ([docx](#))



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# Technical Reports Should:


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- **Elaborate on the work done**
- **Present results and achievements**
- **Address challenges**
- **Communicate lessons learned**
- **Request for changes and modifications**



**BIRD Foundation  
Call for Proposals**  
Deadline: March 7, 2024





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and Development Foundation

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Deadlines

BIRD Call for Proposals

Procedures & Submission Forms

Agreements

Upload System

Reporting Upload System

Fiscal & Technical Meetings

FAQ's





About BIRD

Call For Proposals

Deadlines



## Log In

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**Password**

☐ Remember me
 [Forgot password?](#)

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[Create a new account](#)


Company Projects			
			
Project ID	Project title	Partner (Your Partner's Company username)	Stage
BOG-06-2017-P			Reports
			Continue


## Uploading Documents

BOG-06-2017-P

Created By  
Last update on 28 Jun 2017 01:42

 Executive Summary  
(Closed)

 Proposal  
(Closed)

 Reports  
(Open)

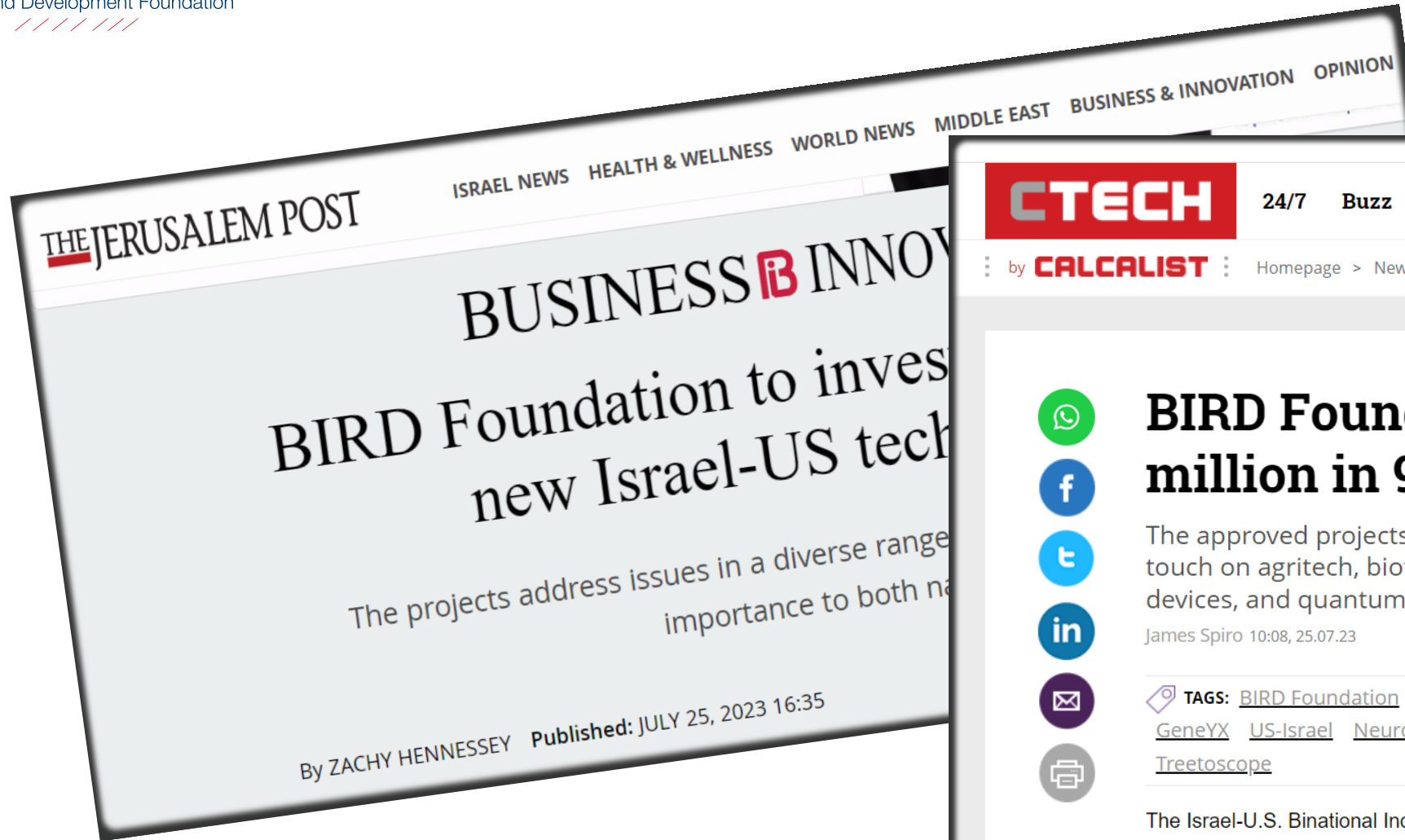
Project report number BIRD Ref. 1111

**Segments**

Segment #	Fiscal US	Fiscal IL	Technical
1	Uploaded	Under Review	Uploaded
2	Not Submitted	Not Submitted	Not Submitted
3	Not Submitted	Not Submitted	Not Submitted


**Commercializations reports**

Semester	US	IL
1 Jul 2017	0	Not Submitted
1 Jan 2018	0	Not Submitted



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## BIRD Foundation invests \$8 million in 9 new projects

The approved projects, with an overall budget of \$23 million, touch on agritech, biotech, electronics, foodtech, medical devices, and quantum technology

James Spiro 10:08, 25.07.23

**TAGS:** [BIRD Foundation](#) [Quantum Machines](#) [Agado Live](#) [AlvaLinks](#) [GeneYX](#) [US-Israel](#) [NeuroTrigger](#) [Oshi](#) [Agromentum](#) [ContainerEyes](#) [Treetoscope](#)

The Israel-U.S. Binational Industrial Research and Development (BIRD) Foundation has announced that it has approved \$8 million in funding for nine new projects between U.S. and Israeli companies. Alongside grants from BIRD, the projects will access private-sector funding and boost the total investment in all projects to \$23 million.



## THE BIZ MARKET

דף הבית | בנקאות-שוק ההון | חוק ומשפט | טכנולוגיה-הייטק | ממשל-פוליטי | מסחר-שווקים | נדל"ן-תשתיות-אנרגיה

אדם טבע ודין: הממשלה הקיצונית ביותר בישראל, בתמיכת השרה להגנת הסביבה, הובילה לאישורו של חוק דיקטטורי א

25/07/2023

### פלטפורמת שיקום למחלות נוירולוגיות, מערכת ליצירת טרקטורים אוטונומיים, תחליף צימחי ואל-אלרגני לדג סלמון, ורכיבים פוטונים לטכנולוגיות מחשוב קוונטי ועוד

ממשלות ארה"ב וישראל מכריזות על השקעה משותפת בסך 8 מיליון דולר  
בשיתופי פעולה של חברות ישראליות ואמריקאיות

24 ביולי, 2023 - חבר הנאמנים של קרן בירד, הקרן הדו-לאומית למחקר ולפיתוח תעשייתיים  
ישראל-ארה"ב, אישרה בישיבת הדירקטוריון שנערכה ביוני 2023 בוועידתו די. סי, השקעות בסך 8 מיליון  
דולר לתשעה פרויקטים משותפים בין חברות אמריקאיות וישראליות. בנוסף למענקים, הפרויקטים צפויים  
לזכות לתמיכה נוספת מהמגזר הפרטי שיביאו את ההשקעה הכוללת בכל הפרויקטים ל-23 מיליון דולר.

**Wishing you great success in your endeavor to develop  
new innovative technologies  
and successfully bring them to the market.**



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[linkedin.com/company/bird-foundation](https://www.linkedin.com/company/bird-foundation)