

# BIRD Foundation

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## Technical Reporting Seminar

Tal Kelem  
Director of Business Development

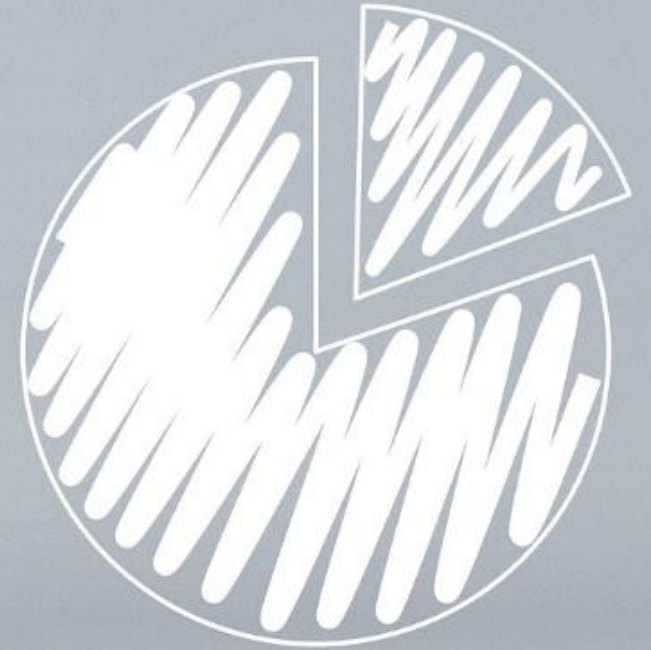
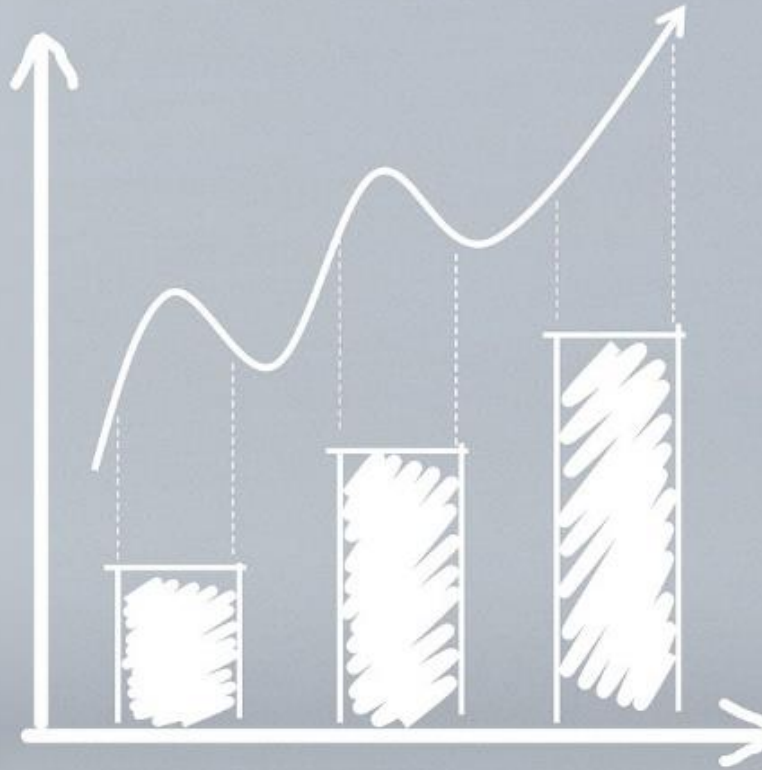
April 2023



Israel-United States Binational Industrial Research and Development Foundation

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

# Reporting



# BIRD Foundation Staff

## Headquarters - Israel

<b>Jaron Lotan</b> <b>Executive Director</b> <a href="mailto:jaron@birdf.com">jaron@birdf.com</a>		
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## U.S. Offices

### West Coast (California)

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### East Coast & Midwest (New Jersey)

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### South (Texas)

**Shiri Freund Koren**  
**Director of Business Development**  
**Energy Center U.S. Coordinator**  
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\*PBC – Primary BIRD Contact

# Documents on BIRD's Website

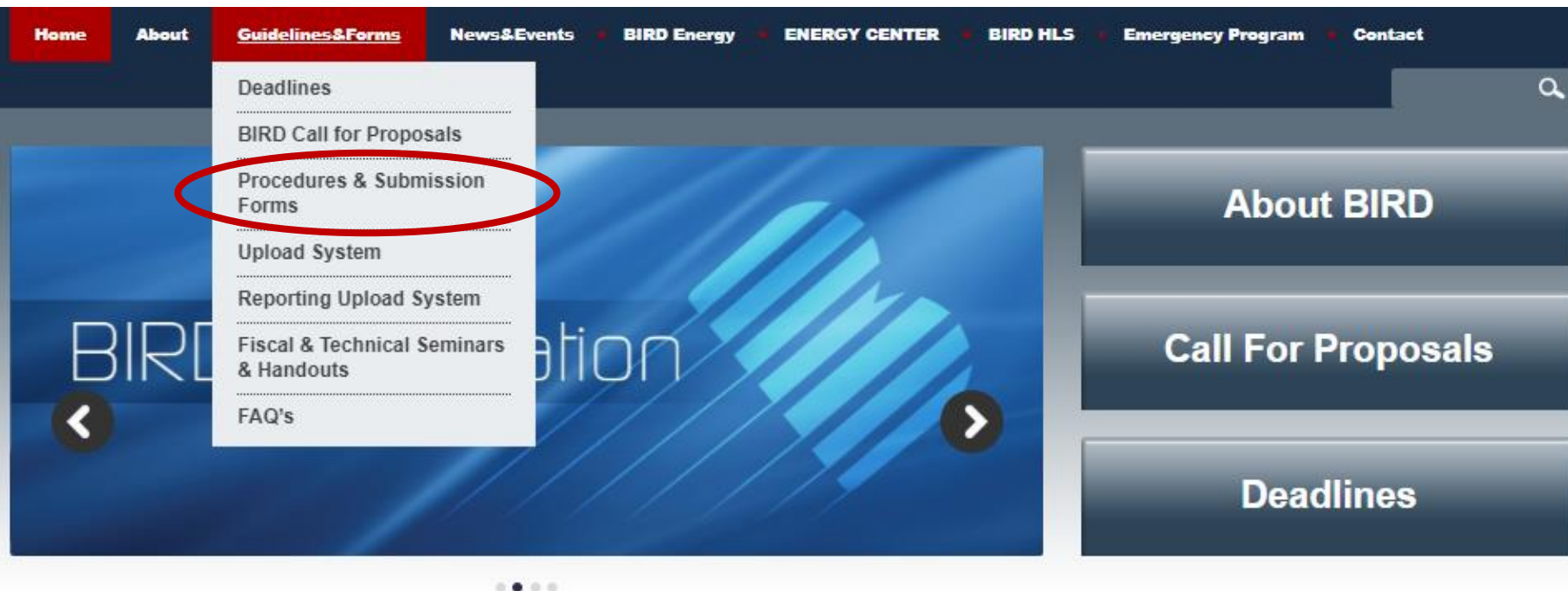
Guidelines & Forms → Fiscal & Technical Seminar & Handouts





# Documents on BIRD's Website

Guidelines & Forms → Procedures & Submission Forms



# Documents on BIRD's Website

Guidelines & Forms → Procedures & Submission Forms → Entire Procedures Handbook

## Procedures & Submission Forms

Deadlines

BIRD Call for Proposals

Procedures & Submission Forms

Upload System

Reporting Upload System

Fiscal & Technical Seminars & Handouts

FAQ's

The purpose of the procedures handbook is to provide you with clear guidelines for submitting the documents required in a BIRD project.

Please do not hesitate to contact us with any questions at:

[oshrat@birdf.com](mailto:oshrat@birdf.com) 972-3-6988301

[Agreements & Reporting Forms](#)

## Guidelines&Forms

### Procedures & Submission Forms

[Submission Forms](#)

[Agreements \(CDA, CPFA\)](#)

[Reporting Procedures](#)

### Guidelines

[Entire Procedures Handbook \(pdf\)](#)

[BIRD Awards \(pdf\)](#)

[The BIRD Model \(pdf\)](#)

[BIRD "Pharma Model" \(pdf\)](#)

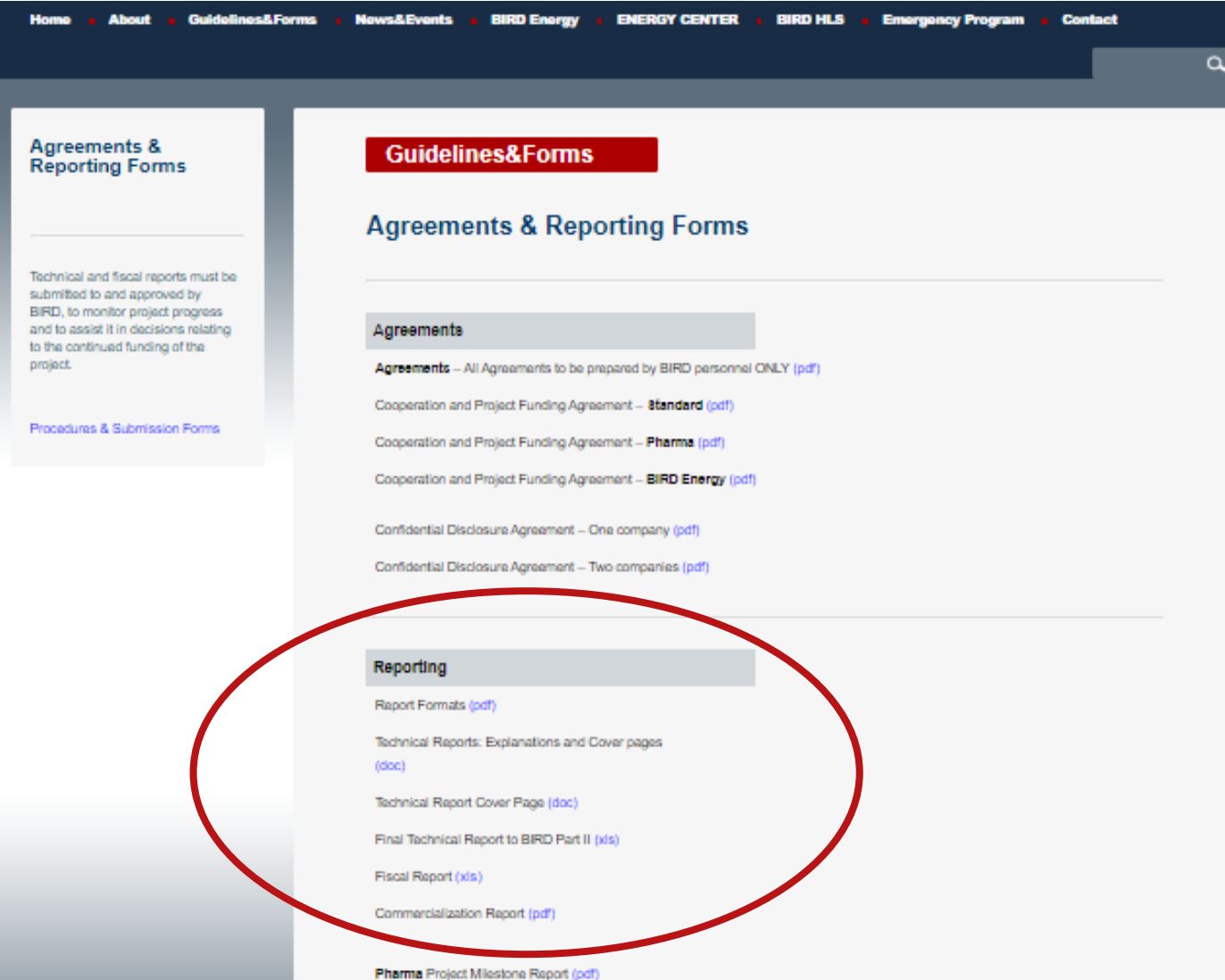
[BIRD Funding Policy for Related Companies \(pdf\)](#)

[BIRD project Process and Timetable \(pdf\)](#)



# Reporting Documents on BIRD's Website

Guidelines & Forms → Procedures & Submission Forms → under Reporting



Home • About • Guidelines&Forms • News&Events • BIRD Energy • ENERGY CENTER • BIRD HLS • Emergency Program • Contact

**Agreements & Reporting Forms**

Technical and fiscal reports must be submitted to and approved by BIRD, to monitor project progress and to assist it in decisions relating to the continued funding of the project.

[Procedures & Submission Forms](#)

**Guidelines&Forms**

**Agreements & Reporting Forms**

**Agreements**

**Agreements** – All Agreements to be prepared by BIRD personnel ONLY (pdf)

Cooperation and Project Funding Agreement – **Standard** (pdf)

Cooperation and Project Funding Agreement – **Pharma** (pdf)

Cooperation and Project Funding Agreement – **BIRD Energy** (pdf)

Confidential Disclosure Agreement – One company (pdf)

Confidential Disclosure Agreement – Two companies (pdf)

**Reporting**

Report Formats (pdf)

Technical Reports: Explanations and Cover pages (doc)

Technical Report Cover Page (doc)

Final Technical Report to BIRD Part II (xls)

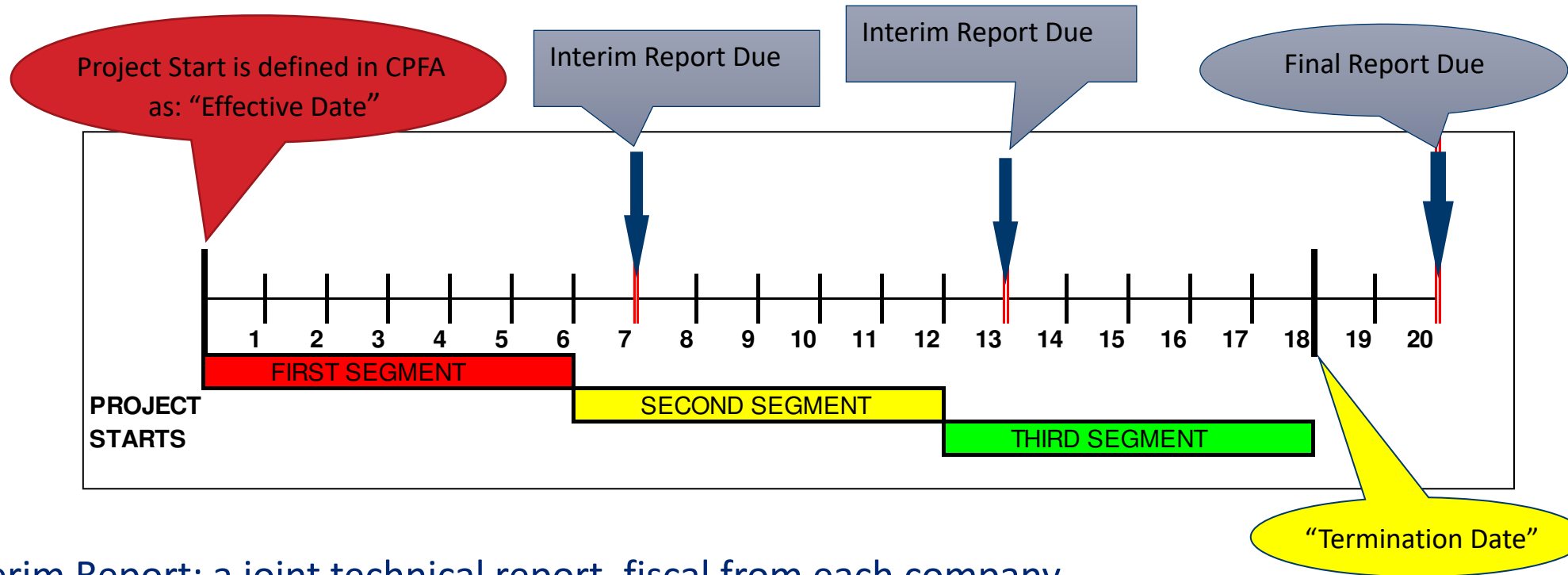
Fiscal Report (xls)

Commercialization Report (pdf)

**Pharma** Project Milestone Report (pdf)

# Project Structure & Report Timing

Project duration (example): 18 months, 3 segments X 6 months



Interim Report: a joint technical report, fiscal from each company

- Interim 1 - Report due 1 month after the end of 1st segment
- Interim 2 - Report due 1 month after the end of 2nd segment
- Final report (interim report + marketing) - due 2 months after end of project



# Reports: Guidelines

- Please prepare the reports “by the book”
- Please provide glossary of acronyms / abbreviations / terms
- If the PBC finds the report difficult to understand, missing information, chapters are not in accordance with the template, unexplained deviations from the Program Plan – the report check may be halted/delayed, hence the fiscal check and payment.
- If you have questions - give us a call!



Photo by Antoine Barres on Unsplash

# Reports: Upload System

## Log In

Login / Create new account

Username

Password

.....

☐ Remember me

Forgot password?

Login

Create a new account

Company Projects			
<div><div></div></div>			
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

# Reports: Hard Copies

We require  
uploading the technical and fiscal reports  
and  
one hard copy sent to our office



# Technical Reports: Content





# Technical Reports: Content

## Standard Report Cover Page (BIRD Procedures & Forms tab in website)

**Technical Report – Cover Page**

BIRD Ref. No.: [REDACTED]

To: The Israel – United States Binational Industrial Research and Development Foundation

Dates of Reporting Segment Covered: from [REDACTED] to [REDACTED]

■ ■ ■

	<b>Israeli Company</b>	<b>U.S. Company</b>
<b>Project Manager:</b>		
Signature	_____	_____
Printed Name	_____	_____
Title	_____	_____
E-mail:	_____	_____
Telephone no.:	_____	_____
<b>Authorized Company Official:</b>		
Signature	_____	_____
Printed Name	_____	_____
Title	_____	_____
E-mail:	_____	_____
Telephone no.:	_____	_____
Date Submitted:	<span style="background-color: red; color: black;">[REDACTED]</span>	

Make sure that the  
report is signed by  
both companies



# Technical Reports: Content

(see Procedures Handbook )

## 1. Report Cover Page

(Procedures & Submission Forms tab → Reporting , on BIRD's website)

## 2. Table of Contents

## 3. Objectives:

- of the project
- of the segment covered by report

## 4. Summary of Accomplishments:

- compare the accomplishments with the objectives (stated above)

## 5. Results:

- on a task-by-task basis
- milestones attained and deliverables
- deviations from the Program Plan
- implications of modifications on the developed product

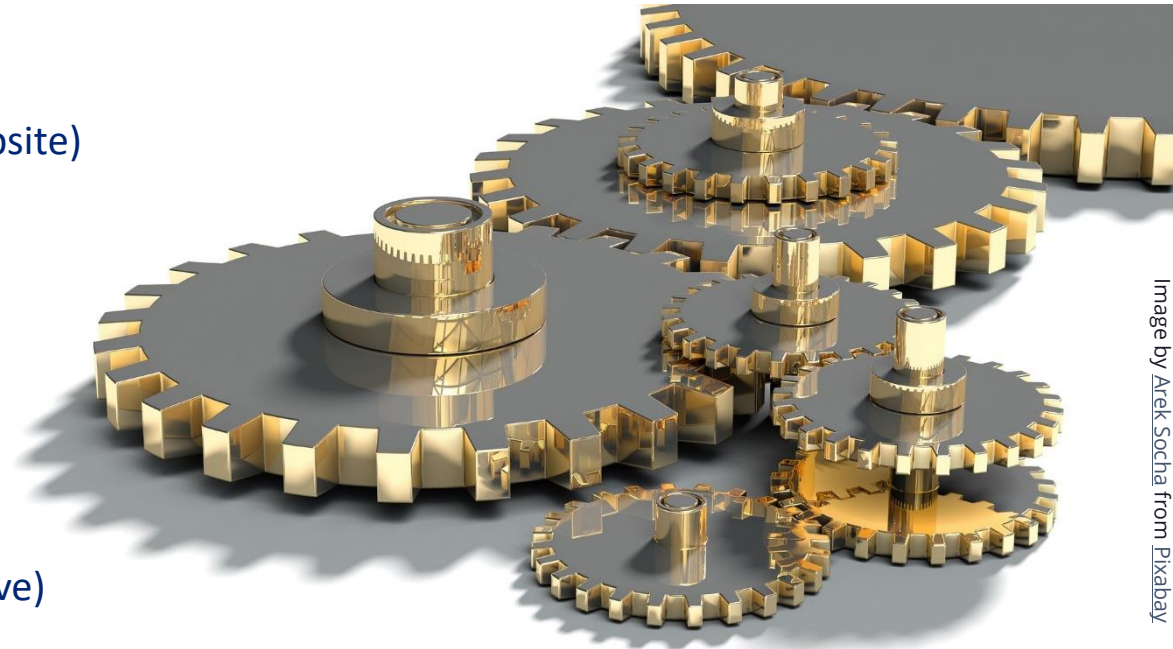


Image by Arek Socha from Pixabay



# Technical Reports: Content

## 6. Plans for Next Project Segment

- Rescheduling or additions to activities
- Impact of changes on original Program Plan
- Extensions – up to 3 months before the project termination date

## 7. Graphical Comparison of Results vs Program Plan

- Show tasks & time-schedule deviations from Program Plan (Annex D of CPFA) in a graphical form (Gantt chart)



# Technical Reports: Content

## 8. Cooperation Between the Companies

- Communication & coordination of activities
- Mutual benefits from integrated work
- Corrective measures taken and needed

### Developing a Successful Partnership

- Identify the undercurrents and importance of the project outcome for your partner
- Recognize cultural differences and the different skills of the parties
- Manage the Relationship across the Network:
  - Develop communication routes, not a single one
  - Develop agreed procedures in case of challenges
  - Create formal and Informal relationships between the companies

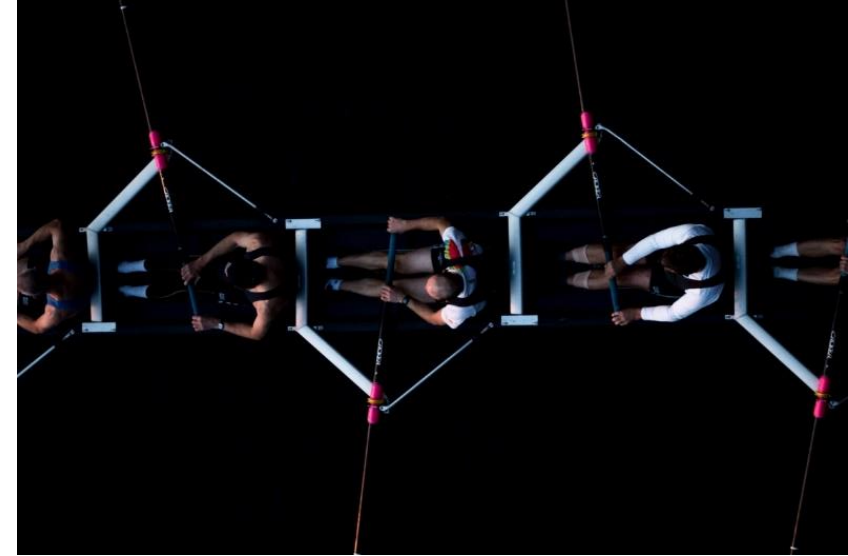


Photo by [Josh Calabrese](#) on [Unsplash](#)

**Invest the Time and Effort, it is critical not less than technology!**

# Technical Reports: Content

## 9. Risk Analysis

- Proposal - original Risk Analysis Table
- Updated Risk Analysis Table
- Add explanation



				Impact
Name	Ranking	Duration	Budget	Commercialization Potential
"Coating does not meet all requirements"	Medium	Medium	Medium	Medium
"Concept of Operation is not acceptable by the FAA"	Low	Medium	Low	Medium

### New evaluation of the risk: Segment 1

"Concept of Operation is not acceptable by the FAA" - Increased Risk

# Technical Reports: Content

## 10. Market and Commercialization Plans

- Changes in market potential or sales forecast
- Impact of market changes on Program Plan

## 11. Published Information

- Articles in professional literature
- Patents
- Press releases





# Example of PR



Locusview founder Shahar Levi (left) and Assaf Harel, General Partner at IGP. Photo: Moti Vagman

Locusview was founded thanks to help from The Israel-United States Binational Industrial Research and Development (BIRD) Foundation. The company's solution focuses on the field crews, inspectors, and back office management, enabling a streamlined data flow and simultaneous mobile and web access to manage the three crucial phases of infrastructure construction projects:

**CTECH** 24/7 Buzz Startups VC @Finance @Work Innovation  
by **CALCALIST** | Homepage | News

**Locusview raises \$64 million series A to accelerate growth of DCM platform**

The Israeli startup has managed within two years of the launch of its first product to integrate it in over 70 of the biggest energy infrastructure companies in the U.S.  
Moti Vagman | 13.01.2021

TAGS: Locusview DCM Construction Funding IGP

Locusview, which develops a Digital Construction Management (DCM) platform for energy, telecom, and water industries managing infrastructure capital projects, announced on Wednesday a \$64 million series A funding round. The investment was led by Israel Growth Partners (IGP), a \$600 million Growth Investment Fund focused on Israeli-based growth-stage technology companies. Existing investors, Leumi Partners, Ciel Insurance and Discount Capital, all also participated in the round, bringing total investments in Locusview to \$80 million.

Locusview was founded in 2015 by Shahar Levi and unlike other companies announcing growth rounds over recent weeks, has been profitable almost from its founding, reporting annual revenue of tens of millions of dollars.

Locusview founder Shahar Levi (left) and Assaf Harel, General Partner at IGP. Photo: Moti Vagman

Locusview was founded thanks to help from The Israel-United States Binational Industrial Research and Development (BIRD) Foundation. The company's solution focuses on the field crews, inspectors, and back office management, enabling a streamlined data flow and simultaneous mobile and web access to manage the three crucial phases of infrastructure construction projects: Planning, Construction, and Close Out. Planning and design data is received via Locusview Web to form a digital job packet. A work order is scheduled and digitally assigned to specific field crews or contractors. The field crews use Locusview Mobile to collect digital as-built data and create material traceability with high accuracy GPS locations. Simultaneously, back office management uses Locusview Web to gain real time visibility, ultimately enabling complete operational awareness of construction work. During Close-Out, a digital closing package is created, significantly reducing technicians and cycle time. Labor and materials are recorded and custom reports are generated to complete the project.

Locusview has managed within two years of the launch of its first product to integrate it in over 70 of the biggest energy infrastructure companies in the U.S., serving over 5,000 crews working on tens of thousands of projects.

CEO Levi told Calcalist that Locusview's technology also has an environmental impact as it helps companies significantly reduce emissions.

"After we raised the money from the BIRD Foundation I went to the U.S. and understood how complex energy infrastructure installations are. Instead of returning home I went to visit the American Gas Association in Chicago and offered them to create an end-to-end platform," Levi told CTECH. "We built a prototype and offered it to other gas institutions as well. Between 2017 and 2018 the company received \$15 million from giant U.S. companies to build the product. I didn't have to raise money or dilute shares because from the first moment we had the biggest gas companies using our platform."

Levi said that in 2018 he was offered to sell the platform, but chose to turn it down. "I went to Brian Cooper, one of the co-founders of Nextiva, and said to him that I need to raise \$5 million for the company. I completed that round and a year later we raised another \$7 million from a Swedish family office involved in the energy market," said Levi. "This round will go entirely to the company and won't be used to acquire shares from employees or investors. We have 120 employees in two offices in Herzliya and another 60 employees in Chicago. We have been a profitable company since we were founded, including during Covid 19. We won tenders from the Indian and Mexican governments during the pandemic and I understood that this was our chance so we decided to raise more money as the demand from our clients is greater than what we can currently provide."

"With the series A round, our intention is to further expand our platform capabilities as well as our team to support the growing demand from existing and new customers parallel with an aggressive acquisition strategy of complementary companies," added Levi.

Assaf Harel, General Partner at IGP, said: "Nearly \$500 billion is invested annually into energy and telecom infrastructures, spotlighting the massive market potential for Locusview. In less than three years, Locusview has been able to become a trusted partner for over 20 of the largest utility companies in the U.S. and to support them with the digitalization of the most critical sectors of their business. We believe that the company is at the right position and time to lead the digital revolution of critical infrastructure construction, globally, using a powerful cloud-based SaaS platform to manage this massive opportunity."



# Example of PR

## *BIRD Foundation okays \$1 million grant for Israel-US Drone Project*

• By ALAN ROSENBAUM

The BIRD Foundation, a binational research and industrial development fund that promotes cooperation between US and Israeli companies, has approved a \$1 million investment for a joint project between BWR Israel and Easy Aerial USA to develop a multi-mission command and control system for unmanned aerial vehicles for national security operations. The project was selected by the US Department of Homeland Security and Israel's Internal Security Ministry as part of the BIRD HLS program, which develops advanced homeland



**BEN ALFI**  
(Einav Meirowtiz)

security technologies.

The collaboration between BWR Israel and Easy Aerial

USA will allow one operator to simultaneously operate multiple drones with several different tasks from an advanced command center, and will be available for every type of autonomous air vehicle.

BWR (Blue White Robotics) develops multi-mission command and control systems for various types of UAVs, operates autonomous systems and provides end-to-end robots as service solutions in agriculture, security, search and rescue, and other fields, utilizing control systems capable of managing hundreds of autonomous vehicles.

Easy Aerial, located in Brook-

lyn, designs and manufactures automated drones and ground control systems. The system allows for takeoff, landing, and charging of the drones without human intervention.

Ben Alfi, founder and CEO of BWR said, "With this support, BWR will launch two control centers in Israel and the United States and will continue to develop and lead the world in autonomous systems operation. Receiving the BIRD HLS grant will lead the autonomous future and bring it into commercialization to meet the professional needs of first responders in Israel and the United States."

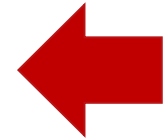


## COOPERATION AND PROJECT FUNDING AGREEMENT

...

### **E. PUBLICATIONS**

- E.1. In any publication in scientific or technical journals of data or other information derived from the work hereunder, or any publication related to the work, and/or marketing and/or promotion of the Product but not including product literature or manuals, the support of the Foundation shall be acknowledged.
- E.2. To the extent so required to permit the Foundation free dissemination of such publications or information, which the Foundation is privileged to disseminate, subject to the limitations of Section F, the Proposer shall be deemed hereby to waive any claim or rights with respect to such dissemination.
- E.3. The Proposer shall furnish to the Foundation two (2) copies of all publications resulting from Foundation-supported work as soon as possible after publication.



# Final Technical Report

## Part I:

Same as in Interim Reports (except section 5 – “Plans for Next Project Segment”)

Including **Future Activities:**

- Future development work planned (jointly/separately) related to the Product
- Marketing activities to be undertaken, (jointly/separately) as part of the Product sales efforts

## Part II: Updated Marketing Forecast



# Final Technical Report

## Part II: Updated Marketing Forecast

Requires a separate signed cover page!

- Re-definition of relevant products / applications
- Market acceptance of product
- Commercialization forecasts
  - ✓ Updated 3 years market size & sales forecast
  - ✓ Comparison with forecast in proposal
- New products opportunities
- Future joint activities planned by companies

<b>Updated Marketing Forecast - Cover Page</b> (Formerly: Final Technical Report - Part II)		
BIRD Ref. No.:		
To: The Israel - United States Binational Industrial Research and Development Foundation		
Project Title:		
Submitted By:		
Israeli Company:		
U.S. Company:		
Project Start Date:		
Development Work Termination Date:		
	Israeli Company	U.S. Company
Project Manager:		
Signature		
Printed Name		
Title		
E-mail:		
Telephone no.:		
Authorized Company Official:		
Signature		
Printed Name		
Title		
E-mail:		
Telephone no.:		
Date Submitted:		

Signed by both companies

# Frequently asked questions

- Actual progress is slower than Program Plan:  
**Do I submit TR as scheduled? YES**
- Actual spending is less than forecast:  
**Do I submit TR as scheduled? YES**
- Actual spending is greater than forecast and actual progress is same as or ahead of Program Plan:  
**Do I submit TR as scheduled? SEE PBC**
- Only TR/Fiscal report is ready:  
**Will submitting TR without fiscal reports for same period,  
or  
submitting fiscal reports without TR reports be of any advantage? NO**



Image by Gerd Altmann from Pixabay

# Frequently asked questions

- What happens if the project scope changes?

- ✓ **Advise PBC in writing/meeting**
- ✓ **Request formal (written) modification by both companies**
  - Include fiscal implications
  - Include new program plan



Image by Gerd Altmann from Pixabay

- What happens if more time is needed to complete the project?

- ✓ **Advise PBC in writing/meeting**
- ✓ **Submit formal (written) request by both companies at least 3 months before Termination Date**
  - Include reasons for delay, and implications
  - Include extended program plan

- What happens if project is completed ahead of schedule?

- ✓ **Complete and submit reports**

# Good Luck!

Tal Kelem  
Director of Business Development



Israel-United States Binational Industrial Research and Development Foundation

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

[www.facebook.com/BIRD Foundation](https://www.facebook.com/BIRD-Foundation)

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