

Proposal Preparation Guidelines

Introduction

The companies are required to submit the joint Project Proposal in compliance with the guidelines outlined in this document. The proposal will address the following aspects: Product Description and Innovation, Project Execution and Cooperation, Marketing and Commercialization Plan, and additional relevant information requested regarding the cooperation between the parties.

The proposal should be coherent, comprehensive, and detailed, **with a maximum length of 60 pages**. (Feel free to remove the instructions from the proposal to gain more space). Please make sure to use either Arial or Calibri font with a font size of 11. Additionally, ensure that the uploaded document does not exceed 8 MB in size.

BIRD expects applicants to adhere strictly to the instructions, ensuring that all requested information is provided. Full compliance with the template and format is required, including section numbering/designation and section captions/titles.

Kindly note that proposals that do not conform to these content, format or size requirements will be automatically disqualified.

We encourage partners to submit a draft proposal before submitting the final version for review by the BIRD staff. Please submit the draft proposal at least one week before the final submission deadline, so the BIRD team will have the time to review it as part of the process.

The Project Proposal should be submitted to BIRD's upload system: <https://upload.birdf.com>.

The full submission will include the upload of each of the following files, separately:

- ▶ Certificate of incorporation – for each company (pdf)
- ▶ Project proposal in Word
- ▶ Project proposal in PDF
- ▶ Budget for IL company
- ▶ Budget for US company
- ▶ Gantt chart
- ▶ Signatures Page (using the Cover page of the Proposal)

For private companies:

▶ (i) **Last available financial reports**. These reports are uploaded separately by each company. The information is accessible to BIRD personnel only and not to the partnering company.

▶ (ii) **List of shareholders** via a specific Excel file template which can be found on: <https://www.birdf.com/guidelines-submission/>. This file should be uploaded on BIRD's Upload System: <https://www.birdf.com/upload-system/>.

This specific shareholder information will be shared only with BIRD personnel and the Board of Governors, and not with the collaborating company or the evaluators.

Note: Failure to submit this shareholder information from either company, as applicable, will result in an incomplete submission and the Proposal will not be accepted.

The following is a detailed description of the required contents of each section:

A. Cover Page

**ALL THE REQUESTED INFORMATION IS MANDATORY.
DO NOT MAKE ANY CHANGES TO THE FORMAT.**

To: Israel-U.S. Binational Industrial Research and Development Foundation

From: Israeli Company **Insert IS Co. Name** (as appears in the Certificate of Incorporation)

Office Address -	Mailing Address (not an e-mail address) -
Telephone No.:	

* An Israeli address and telephone number are mandatory

From: U.S. Company **Insert U.S. Co. Name** (as appears in the Certificate of Incorporation)

Office Address -	Mailing Address (not an e-mail address) -
Telephone No.:	

* A U.S. address and telephone number are mandatory

Project Title:

Project Duration: _____ months

Project Budget: \$ _____⁽¹⁾

	Israeli Company Authorized Company Official	U.S. Company Authorized Company Official
Submitted by:		
Signature:		
Printed Name:		
Title:		
E-mail:		
Date Submitted:		

(1) Project Budget – must match the sum of the companies' budgets as presented in the proposal.

B. Table of Contents (including page numbers)

There must be strict adherence to section numbering.

C. Executive Summary (Up to 5 pages)

Please insert the updated Executive Summary of the Project and ensure that the information of the project title, project duration, and project budget is up to date. You are welcome to revise the Executive Summary with any new details, insights, or updates gathered during the proposal preparation period. (No need to include the signatures of authorized company officials again).

Executive Summary of BIRD Project Proposal **(Maximum 5 pages)**

	Israeli Company	U.S. Company
Full company name (as appears on the Certificate of Incorporation)		
Company locations (headquarters and relevant division address, including full street address, state, city, zip code) – not only P.O. Box		
Company website	www.	www.
Year established		
Revenues: most recent fiscal year _____	\$ million	\$ million
Increase / (Decrease) over previous year	%	%
Number of employees		
Ownership (Public / Private)		
Percentage ownership of the company by the other company (if relevant)		
Relationship of the companies – - Parent/Subsidiary - Common Ownership - No common relationship - Other		
Number of previous BIRD projects		

Israeli Company Registration Number	
U.S. Company DUNS Number	

Project title	
Project budget (\$)	\$
Project duration (months)	months

1. **Abstract:** A summary, **no more than 20 lines**, describing the essence of the project and its expected outcome. The abstract should be self-explanatory to someone who has no previous knowledge in the field.
2. **Companies Background:** Describe the major technical, marketing, and financial assets and strong points of each one of the two companies that are relevant to the successful completion of the proposed development project, and to its successful commercialization. Describe the characteristics and qualities possessed by each company that would make it a good strategic partner to the other company. (Please insert as section 2.1 and 2.2)
3. **The Innovation:** Provide a concise description of the product / technology to be developed within the project, including its uniqueness, its innovation, and how it will satisfy market needs that are not met today.
4. **Collaborative Relationship:** Describe the anticipated role of each company during the development project and during product commercialization. Indicate approximately how the development budget will be split between the two companies, and from where the non-BIRD portion of the project expenses will be obtained. Describe the expected basis and arrangement between the two companies regarding sharing of revenues, IP and other benefits during commercialization.
5. **Commercial Potential:** State the estimated relevant market size for the developed product, and the expected market share after 1-3 years of commercialization. (Please indicate the sources employed in deriving this forecast.) Estimate the volume and the total \$ value of direct sales revenue expected to result from the developed products over each one of the first 3 years of commercialization.

Calendar year	20xx	20xx	20xx
Target market size for developed product (M\$):			
Estimated market share (%):	-	-	-
Estimated sales quantity (units):	-	-	-
Estimated representative unit price (\$/unit):			
Estimated sales revenue (\$):			
Estimated cumulative sales revenue (\$):	0	0	0

D. The Innovation (Up to 7 pages)

This section should address the following:

How are things done in this area today? What is the current state-of-the-art for the target markets?

1. What are the limitations of the current technologies in the market? This is your opportunity to elaborate on the shortcomings that exist in the proposed product area as a prelude to the description of the innovation and how it overcomes these shortcomings.
2. What is the product concept? Sketches, diagrams, and tables should be included to help describe the product. This description should clearly identify in which way the innovation overcomes current limitations. Provide the work done so far including test and validation results to substantiate the claim that the goals of this project are achievable. Sketches, diagrams, and tables should be included to help understand the innovation status.

3. Is this a unique product? Why do you believe it will be successful? How will the product differ from those on the market today?
4. What is the patent situation, including background patents and the potential for new patents?
5. Which regulatory and technical standards are relevant to the developed product? Will the proposed product meet current and/or emerging standards?
6. Were any of the companies funded by other Israeli and/or U.S. government agencies (such as the Israel Innovation Authority, the NIH, DHS, SBIR etc.), which have supported any part of the innovation development thus far?
7. Are there any obligations to other government agencies?

E. Proposed Project Execution

This section of the proposal is to be organized in three parts: "Analysis of the Problem", "Proposed Approach" and "Analysis of the Project's TRL":

E.1. R&D Program

The purpose of this section is to provide a credible foundation for the proposed program by identifying areas that require attention and emphasizing challenges that must be resolved to achieve the program objectives. Here are the key points to be addressed:

1. **Required Properties and Functions:** Define the desired properties and functions of the end-product to be used in the market environment. Explain how market input has played a vital role in formulating these specific characteristics.
2. **Challenges and Technological Issues:** Identify and describe the challenges associated with realizing the required properties and functions. Discuss the technological issues and economic constraints that need to be addressed to achieve the program's objectives. Additionally, mention the technological resources available to the companies to address these challenges.

In summary, this section focuses on defining the desired properties and functions of the end-product, as well as identifying and addressing the challenges and technological issues that need to be overcome to reach the desired outcome.

E.2. Project Execution Strategy

This section outlines the **general plan**, highlights the **techniques and methods** for product development along with relevant experience, addresses how you plan to mitigate the **technical or economic constraints**, and provides a comprehensive breakdown of tasks with their objectives, contents, resource requirements, and responsible parties.

1. **General Plan:** Present an overall plan of the proposed effort, including milestones and deliverables necessary to achieve the program's objectives. Focus on straightforward descriptions of "what has to be done" without delving into discussions on problem-solving approaches.
2. **Techniques and Methods:** Describe the techniques and methods that will be used for developing the product. Provide evidence of relevant experience in developing similar products to demonstrate a valid experience base.
3. **Technical or Economic Constraints:** Discuss any technical or economic constraints that need to be considered during the development process.
4. **Task Identification and Description:** This section constitutes the core technical aspect of the proposal. Each task will be carefully identified and thoroughly described, including its objective, contents, required resources, and the responsible company. Any potential challenges will be acknowledged, along with the proposed approach to mitigate these constraints effectively. Additionally, if the involvement of other consultants or subcontractors is anticipated for completing the task, it will be stated here.

- a. Define **up to 15 specific and measurable tasks** to be carried out throughout the development phase of the project. Number and name each one of the tasks.

NOTES:

- (1) There must be **complete consistency** in the numbers, names, start date and finish date of the tasks listed here and those listed in the Program Plan (see Section F) and Project Budget of each company (see Section L), below.
- (2) The defined tasks must be identical for both companies. Each specific task may be executed by one company, the other, or jointly by both. Thus, the Excel budget workbook of the two companies (see Section L, ahead) will list precisely the same tasks. However, if one of the companies does not participate in the execution of a specific task, the company will not include any budget for that task.
- b. Describe, for each task, the specific approach that will be employed. Detail the specific techniques to be used to solve the previously identified problems. Thus, in this section, the companies demonstrate that not only are they aware of the state-of-the-art in their industry and the limitations of current practices (D.1.), but they also have an innovative idea (D.2.), understand the challenges associated with developing the idea to commercial readiness (E.1.) and know how to deal with constraints and challenges. For each task, provide supporting information that justifies the selected approach, where appropriate.
- c. Describe for each task - How the task is implemented (technologically); Describe the ACTUAL R&D to be done: what tools/algorithms/methods will be used and implemented. If data is needed, where will it come from and how it is tagged etc. What is the technological innovation, provide supporting information (preliminary testing/validation/POC/publications) which justifies the specific approach, where appropriate.
- d. Describe for each task - What is a measurable outcome (KPI) of the task - how does the company evaluate that the task is complete.
- e. Since the final objective is a product or process, tasks addressed should include compliance to standards (or why the product will not comply with relevant standards), prototyping, regulatory approvals, beta testing, exhibitions, marketing activities, documentation, etc. For those tasks relating to "testing", for example, details should be given as to what is to be tested, how many tests are needed, test objectives, test methodology, expected results, etc., rather than writing "tests will be performed".
- f. Discuss alternate approaches to resolving problems and the basis for selecting the preferred solution. Even if a preferred solution has not yet been identified, the various alternatives should be reviewed, along with their pros and cons.

Please use the following [“Detailed Task Description Form”](#) to complete the information required for each task in section 4 above, following the line-by-line instructions below:

Line 1:	Task # should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F).
Line 2:	Task name should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F). The name should not be longer than 40 characters.
Line 3:	Mark with an “x” which Company is taking part in the task. A company participating in a given task should have a budget for the task (Line 7, below).
Line 4:	Task duration should be the number of days between the start and end dates of the task and should be given in whole numbers. It should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F).
Line 5:	The start and end dates of the task should be given in a DD/MM/YY format and should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F).
Line 6:	Insert the name of the US and the IL Cos. (fill it out once for all task tables).
Line 7:	The task budgets for each Company should be extracted directly from the “Tasks Report” tab in the Excel Budget of each Co. and should be given in units of K\$.
Line 8:	Insert the % of the total task budget attributed to each Co. (derived from Line 7).
Line 9:	Describe the overall objective / goal of the task, in 1-3 sentences.
Line 10:	Provide a textual description (no size restriction) of the main task activities.
Line 11:	Insert which milestone(s) are to be reached in this task, as given in the “Milestones and Deliverables Form” (found at the end of this section).
Line 12:	Insert which deliverable(s) are to be provided in this task, as given in the “Milestones and Deliverables Form” (found at the end of this section).

Detailed Task Description Form

1.	Task #			
2.	Task name			
3.	Company taking part in task (mark with “x”)	IL:	US:	Both:
4.	Task duration (days)			
5.	Start date (DD/MM/YY)		End date (DD/MM/YY):	
6.	Company name:	IL:	US:	
7.	Task budget (K\$):			Total:
8.	Task budget (% of total):	%	%	100%
9.	Objective of task:			
10.	Task Description: (no restriction on size)			
11.	Milestone(s) to be reached:			
12.	Deliverable(s) to be provided:			

5. Setting Milestones: Some of the tasks defined in item 4, above, should have **measurable milestones to reach**, as an indication of task completion. The following guidelines apply in setting the milestones:

- a. Each milestone must have a specific **target date** by which it is expected to be reached, preferably (but not compulsory) at the **end of a specific task**.
- b. The milestone description must relate to how is it going to be measured, so that both the Project managers and the BIRD staff can verify if it has been reached.
- c. At least 1 milestone should be defined to be reached within each Project segment.

Please use the [“Milestones and Deliverables Form”](#) to complete the information required for each milestone, as listed in items a-c, above.

6. Provision of Tangible Deliverables: Some of the milestones defined in item 5, above, should have **tangible** deliverables to provide, as an indication of task, milestone or Project completion. The following guidelines apply in specifying the deliverables:

- a. Each deliverable must have a specific **target date** by which it is expected to be completed, preferably (but not compulsory) at the end of a specific task or milestone.
- b. Each deliverable must include a physical hardware or software object / component / product with defined characteristics / specifications / features that can be measured and compared to a given planned target.
- c. There must be **at least one** tangible deliverable **at the completion** of the Project.

Please use the form **“Milestones and Deliverables Form”** to complete the information required for each deliverable listed in in items a-c, above, and paste it to Section E.2. of the Proposal. Fill-out only the white cells.

Milestones and Deliverables Form

#	Milestone Definition / Description and how it will be Measured	Milestone Date (MM/YY)
1		
2		
3		
4		
5		
#	Deliverable Definition & Description	Deliverable Date (MM/YY)
1		
2		
3		[end of project]

E.3 Analysis of the Project's TRL (Up to 2 pages)

This section aims to establish the project's Technology Readiness Level (TRL) **before** the project's inception and **following** the project's completion. It is essential to explain the gap between the current product TRL (before the project initiation) and its TRL by the end of the project and explain in short how the project activities will fill this gap.

You are asked to review the **TRL DEFINITIONS** (See **APPENDIX below**) and identify the project's current TRL based on the definitions provided in this table and your acquaintance with the current status of the project. You are asked to substantiate this assertion with examples.

You are also asked to predict the project's TRL following its completion and to justify this prediction based on the project's goals and deliverables (as provided in section E.2), and the project's plan (as provided in section F).

Use the following two templates to provide your analysis. Please provide the most relevant examples.

Identify Project's TRL prior to the Project Inception	Examples substantiating the project's TRL prior to Project Inception
(Provide here the current TRL)	(Free text explaining your choice)
	(Examples of achievements that were accomplished prior to the project's inception that will support your choice) – Example 1
	(Examples of achievements that were accomplished prior to the project's inception that will support your choice) – Example 2

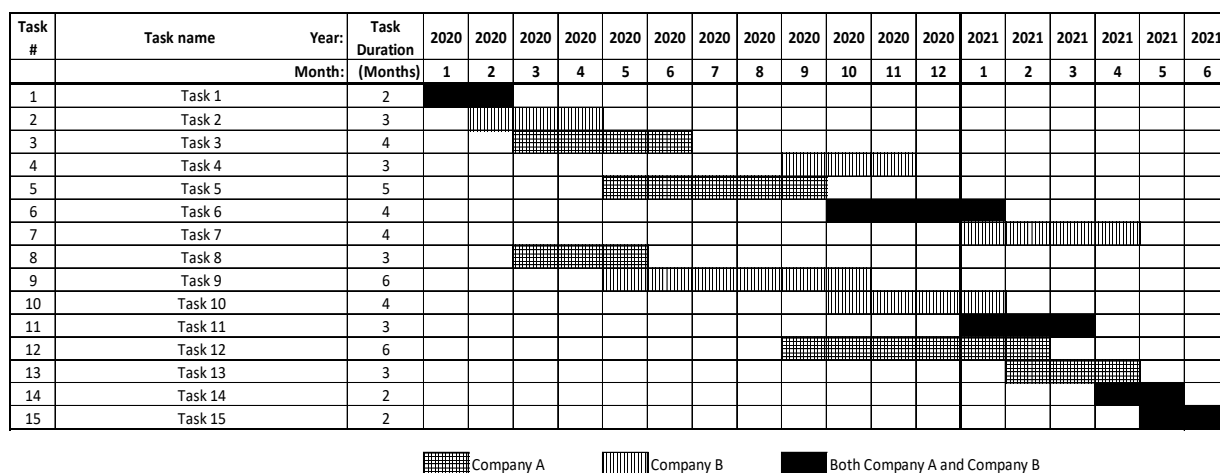
Expected Project's TRL by the Project Completion	Examples substantiating the project's expected TRL by the Project's Completion (based on the Goals and Deliverables provided in section E.2)
(Provide here the expected TRL)	(Free text explaining your prediction)
	(Example of Goals and Deliverables from Section E.2 that will support your prediction) – Example 1
	(Example of Goals and Deliverables from Section E.2 that will support your prediction) – Example 2

F. Program Plan - Graphical Form (Up to 2 pages)

The Program Plan should consist of a chronological schedule of program activities, defined as detailed tasks and presented in graphical form (GANTT chart). The following guidelines should be followed in preparing the GANTT chart:

- a. The tasks in the GANTT chart should coincide with the assigned number, name, start date and finish date, defined in item 4 of Section E.2. (above) and in the companies' budgets (section L, ahead).
- b. Task responsibility - for each task, show graphically which of the two companies will be responsible for its execution. Since both companies can share responsibility to execute the same task, show this graphically as well.
- c. The Program Plan (GANTT) should encompass the entire duration of the Project.
- d. The time axis of the GANTT chart should have a resolution not less than quarters but not more than months.

An example of a typical summary GANTT chart is illustrated below:



Should the project be approved, an updated summary GANTT representing the Program Plan will be incorporated into the **Cooperation and Project Funding Agreement (CPFA)** and will be used by the Foundation in monitoring project progress.

NOTE: The Program Plan (GANTT) should be one of the files to be uploaded separately to the BIRD Upload System site as a component of the Proposal.

G. The Market - (Up to 3 pages)

This section covers market analysis, market needs, performance, price, manufacturing cost, market size and growth, market share, competition, and regulatory barriers. Construct this section based on the following subjects.

1. **Market Needs:** Identify the market needs being served and whether the companies are currently active in developing and selling similar products. Provide the basis for these market needs.
2. **Performance, Price, and Production Cost:** Define the required performance features and planned selling price to penetrate the market successfully. If the product is part of a more extensive system, explain the leverage it provides to the entire system. Add a discussion on pricing considerations, including planned BOM.
3. **Market Size and Growth:** Determine the current market size in terms of physical units and value in US dollars. Assess the companies' current market share and project the expected growth rate over the product's sales window. Identify any factors that could significantly alter this projection.
Market Share and Sales: Estimate the expected market share captured in the first year and over the product's lifetime. Specify the number of units sold each year and the unit selling price to third parties. The quantitative estimate of the above market size and share of the above revenue forecast should be summarized and presented in the table appearing in the updated Executive Summary chapter.
4. **Additional Market Information:** Include any relevant materials like product brochures, expressions of interest from potential customers, marketing agreements, etc.
5. **Regulatory Barriers:** Identify potential regulatory barriers and describe how they will be overcome.
6. **Competition:** Assess existing or expected competition, including competing companies, their products, performance, and prices. You can use a competition comparison table. Evaluate the impact of competition on the proposed product's commercialization. Identify the value proposition of the product in comparison to the competition.

H. Commercialization – Plans and Prospects - (Up to 3 pages)

H.1. Product Manufacturing, Marketing, Sales Activities and Resources

This section discusses important considerations for a solid commercialization program. It raises the following questions:

1. **Production (if relevant):** Will both companies be involved in production? How can the proposed product manufacturing be integrated into existing facilities? If outsourcing is planned, which company will be primarily responsible, and what potential subcontractors could be used?
2. **Marketing and Sales:** What is the planned Go-To-Market strategy? Which company will handle marketing, sales, and sales support? If both, what role will each company play? What are the current sales activities of the companies in the target market segments and geographical regions?
3. **Sales and Service Network:** Do the companies have an existing sales and service network? If not, how do they plan to establish one, and what resources are needed?

I. Economic and Social Impact and Cooperation – (Up to 2 pages)

I.1. Economic Impact

An important factor is the benefit to Israel and the U.S. in the form of new export markets, new employment opportunities, new capital formation, productivity improvements, etc. Please elaborate on issues which are relevant to the project's economic outcome and impact.

I.2. Social Impact

The social contributions of the project are addressed in this section. It emphasizes the social impact of the joint project throughout its lifetime and beyond. The summary should elaborate on various aspects, including the expected environmental impact (positive or negative), sustainability of product consumption and production, and contributions to fields such as health, education, improved nutrition, sustainable agriculture/energy/industrialization/transportation/cities.

I.3. Cooperation between the Companies and Risk/Revenue/Profit Sharing

This section focuses on the projected mode and extent of cooperative activity between the companies. It highlights the importance of risk-sharing during product development and commercialization. Evaluating the proposal involves assessing the financial exposure shared by both companies and the expected benefits during product commercialization. The summary should elaborate on the agreed-upon roles, risk/revenue/profit-sharing, and the business relationship between the two companies.

Please indicate specifically what has been already agreed between the companies and what is left to be discussed if and when your project gets approved.

J. The Companies and Their Resources – (Up to 2 pages)

Please provide information about each of the companies, including the following:

1. **Financial Information:** Provide validated financial information demonstrating the companies' resources to cover their project cost and support commercialization. Include expected and realized annual revenues from the past two fiscal years, along with profitability indications.
2. **Relevant Facilities and Infrastructure:** Describe facilities, equipment, and infrastructure expected to be utilized during the project and commercialization phase.
3. **Integration with Existing Structure:** Assess the extent to which the proposed project can be absorbed into each company's existing structure. Identify available staff, equipment, facilities, and the need for hiring, obtaining capital equipment, or expanding manufacturing operations.
4. **Achievements and significant milestones:** mention the company's achievements in relation to the relevant project's aim such as raised funds, competitions, prominent board members, and any other achievement that reflects the company's capabilities.
5. **Previous BIRD-Funded Projects:** If applicable, describe prior BIRD-funded projects, including program scope, duration, and commercial outcomes such as revenues from BIRD product commercialization and repayments. Discuss the future commercial potential of products developed in previous BIRD projects.

In summary, this section addresses financial information, relevant facilities, integration with existing structure, previous BIRD-funded projects, and relationships with other supported projects.

K. Organizations (Up to 3 pages)

1. Provide an organization chart for the project, identifying each company's project manager and the overall program manager and indicate the relationship of this ad hoc organization to the formal hierarchies in the companies. Identify the program's key project personnel and their responsibilities.
2. Regarding staff – indicate positions to be filled by new employees and identify the status of these staff.
3. Identify the role of key consultants and subcontractors on the organization chart and indicate if a relationship between the consultants/subcontractors and the companies currently exists.
4. Please provide concise bios (up to 140 words each) for key project personnel. Include their roles, job titles, and relevant experience and accomplishments directly tied to their positions in the project.

L. Project Budget

L.1. Introduction and General Guidelines

The budget should include all development and marketing expenses directly associated with the project that will be incurred by each company throughout the entire development phase. Each company should download the budget template (Excel file) found on the BIRD website and fill in the details that depict its planned expenses during the project, following the instructions provided in this section.

A separate budget should be prepared and presented for each company's activities and should cover the entire duration of the project, as proposed. To uphold confidentiality, each company shall be responsible for uploading its respective budget file to BIRD's Upload System. The aggregate project budget shall be the summation of the budgets submitted by the two collaborating partners.

Kindly note: Neither partner's portion in the combined budget can be less than 30% of the total.

BIRD's funding of the project commences on the Effective Date (start date) of the BIRD project, which can be no earlier than the 1st of the next month after signing the CPFA. Expenses incurred prior to the Effective Date won't be accepted by BIRD.

Before starting the budget-building process, you should already have available:

- a. The definition of up to 15 major tasks (activities), including the number and name (short textual description) of each task. These tasks should completely coincide with the tasks defined and described in the section "Proposed R&D Program/Proposed Approach" (Section E.2), above.
- b. The start date and completion date of each task (in day/month/year format), or as a default, the duration (in days) of each task. The tasks should completely coincide with the GANTT chart presented in the section "Program Plan" (Section F), above.

L.2. Step by Step Explanation on Budget Preparation

Each company should prepare its budget in a detailed fashion, using the format for each specific "Task Budget" and the format of the "Total Budget" (shown below), while referring to the instructions and explanations below.

NOTE: The detailed budget components, the calculation of these components and the presentation of the budget in the format presented here have been incorporated in an Excel workbook. This workbook is available to the Proposer (please download it from BIRD's website).

1. Proceed to build your company's budget- You can start the process with any of the tasks and in any order, by activating the corresponding worksheet labelled Task 1 through Task 15 (see pages below for the format of "Task Budget:"). You are asked **to relate only to the input data cells**, by entering data only in the yellow-coloured cells.

NOTE: Instructions and comments related to specific expense components and data items are given for items colored light green. You can read the comments by pointing to the specific cell. The instructions and comments are also given below.

2. Whenever there is a need to define the name of a specific expense, such as the name and profession of a specific employee (in direct labor), the name and purchase cost of a specific equipment item, the name of a specific expendable material, etc., enter the definition in the appropriate location (always in a yellow-colored cell) of the "Total Budget" worksheet. The information you enter in the "Total Budget" worksheet will be copied to and will appear in all the Task worksheets.

NOTE: If the formats of specific input cells do not provide you enough space to insert a meaningful description of the expense items, please attach an appendix to the budget form containing the referenced full-length description of these expense items.

3. After defining a specific expense, return to the Task worksheet you have started to work on and complete the input information concerning the specific expense (again, by entering data only in the yellow-colored cells). Repeat this sequential procedure for all the expense categories relevant to the Task.
 4. Follow the procedure described in Section 2-3 above for all the Tasks in your project. The total cost of a Task will be calculated at the bottom of the Task worksheet (including all built-in overhead allowances) and will also appear in the "Tasks Report" summary worksheet, itemized by expense type.
 5. The cumulative values of all the expense components in all Tasks will appear in the "Total Budget" worksheet, at the corresponding location of the expense component in the Tasks worksheets.
- NOTE: Please do not attach the budget worksheets of the individual tasks to the proposal document. The complete Excel workbook softcopy of the "Task Budget", which includes the individual budgets of each task, should be uploaded separately to BIRD's upload system.**
6. The budget can only include expenses incurred in Israel and in the US.
 7. **For any item that is over \$50,000, we ask that you provide a breakdown and more detail.**

Format of the Task-Based Budget Form

BIRD Foundation Procedures Handbook

Co. Name:

Task #: Task name:

PROPOSED TASK BUDGET From date: MM/DD/YY To date: MM/DD/YY

Task duration: 0 days

IS
US

Description		Details				Cost (\$)	Total (\$)
I. Direct Labor							
Employee's Name (TBD if yet unknown)	Employee's Profession	Employee Location	Gross Annual Salary* (\$)	% on Task	No. of Days in Task	Cost to Project (\$)	
Empl. 1:			-		0	0	
Empl. 2:			-		0	0	
Empl. 3:			-		0	0	
Empl. 4:			-		0	0	
Empl. 5:			-		0	0	
Empl. 6:			-		0	0	
Empl. 7:			-		0	0	
Empl. 8:			-		0	0	
Empl. 9:			-		0	0	
Empl. 10:			-		0	0	
Empl. 11:			-		0	0	
Empl. 12:			-		0	0	
Empl. 13:			-		0	0	
Empl. 14:			-		0	0	
Empl. 15:			-		0	0	
Empl. 16:			-		0	0	
Empl. 17:			-		0	0	
Empl. 18:			-		0	0	
Empl. 19:			-		0	0	
Empl. 20:			-		0	0	
Total, Direct Labor			* Including social benefits			0	
Overhead @ 25%						0	
Subtotal, Direct Labor + Overhead							0
II. Equipment							
Purchased Equipment Description	Purchased Cost (\$/unit)	No. of Units	% On Task	% Annual Depreciation	Depre-ciation (\$)		
Item 1	-	-		33.3%	0		
Item 2	-	-		33.3%	0		
Item 3	-	-		33.3%	0		
Item 4	-	-		33.3%	0		
Item 5	-	-		33.3%	0		
Item 6	-	-		33.3%	0		
Item 7	-	-		33.3%	0		
Item 8	-	-		33.3%	0		
Item 9	-	-		33.3%	0		
Item 10	-	-		33.3%	0		
Subtotal, Purchased Equipment						0	
Leased Equipment Description	Monthly Lease Cost (\$/unit)	No. of Units	% On Task		Total Leasing Cost (\$)		
Item 1	-	-			0		
Item 2	-	-			0		
Item 3	-	-			0		
Subtotal, Leased Equipment						0	
Subtotal, Purchased or Leased Equipment							0
III. Expendable Materials & Supplies							
Description	Cost (\$)						
Item 1							
Item 2							
Item 3							
Item 4							
Item 5							
Item 6							
Item 7							
Item 8							
Item 9							
Item 10							
Subtotal, Expendable Materials & Supplies							0

Format of the Task-Based Budget Form (continued)

Co. Name: _____		Task #: _____		Task name: _____	
PROPOSED TASK BUDGET		From date: _____ MM/DD/YY		To date: _____ MM/DD/YY	
		Task duration: 0 days			

IV. Travel						
Foreign Travel						
Destination	Purpose	Cost Per Person Per Trip (\$)	No. of Trips	No. of People Per Trip	Duration Per Trip (days)	Cost (\$)
Dest. 1		-		-	-	0
Dest. 2		-		-	-	0
Dest. 3		-		-	-	0
Dest. 4		-		-	-	0
Dest. 5		-		-	-	0
Dest. 6		-		-	-	0
Subtotal, Foreign Travel			0			0
Domestic Travel						
Destination	Purpose	Cost Per Person Per Trip (\$)	No. of Trips	No. of People Per Trip	Duration Per Trip (days)	Cost (\$)
Dest. 1		-		-	-	0
Dest. 2		-		-	-	0
Dest. 3		-		-	-	0
Subtotal, Domestic Travel			0			0
Subtotal, Travel						0
V. Subcontracts						
Service to be Performed	Name of Subcontractor	Country Service Given	Cost (\$)			
Subcont. 1						
Subcont. 2						
Subcont. 3						
Subcont. 4						
Subcont. 5						
Subcont. 6						
Subtotal, Subcontracts			0			
VI. Consultants						
Service to be Performed	Name of Consultant	Hourly Rate (\$/Hr.)	No. of Hours	Cost (\$)		
Consult. 1		-		0		
Consult. 2		-		0		
Consult. 3		-		0		
Consult. 4		-		0		
Consult. 5		-		0		
Consult. 6		-		0		
Subtotal, Consultants				0		
VII. Other Expenses						
Item	Description	Cost (\$)				
Item 1						
Item 2						
Item 3						
Item 4						
Item 5						
Subtotal, Other Expenses		0				
Subtotal task budget, before G&A Expenses		0				
General & Administrative Expenses (G&A) @ 5%		0				
Total Task Budget		0				

Format of the Proposed "Total Budget" Form

PROPOSED PROJECT BUDGET						
Company name: 						
Project duration: months						
I. Direct Labor						
Employee's Name (TBD if yet unknown)	Employee's Profession	Employee location	Gross Annual Salary* (\$)	% on Project	Cost to Project (\$)	
Empl. 1:				0%	0	
Empl. 2:				0%	0	
Empl. 3:				0%	0	
Empl. 4:				0%	0	
Empl. 5:				0%	0	
Empl. 6:				0%	0	
Empl. 7:				0%	0	
Empl. 8:				0%	0	
Empl. 9:				0%	0	
Empl. 10:				0%	0	
Empl. 11:				0%	0	
Empl. 12:				0%	0	
Empl. 13:				0%	0	
Empl. 14:				0%	0	
Empl. 15:				0%	0	
Empl. 16:				0%	0	
Empl. 17:				0%	0	
Empl. 18:				0%	0	
Empl. 19:				0%	0	
Empl. 20:				0%	0	
Total, Direct Labor			* Including social benefits		0	
Overhead @ 25%					0	
Subtotal, Direct Labor + Overhead						0
II. Equipment						
Purchased Equipment Description	Purchased Cost (\$/unit)	No. of Units	% On Project	% Annual Depreciation	Depre-ciation (\$)	
Item 1			0%	33.3%	0	
Item 2			0%	33.3%	0	
Item 3			0%	33.3%	0	
Item 4			0%	33.3%	0	
Item 5			0%	33.3%	0	
Item 6			0%	33.3%	0	
Item 7			0%	33.3%	0	
Item 8			0%	33.3%	0	
Item 9			0%	33.3%	0	
Item 10			0%	33.3%	0	
Subtotal, Purchased Equipment					0	
Leased Equipment Description	Monthly Lease Cost (\$/unit)	No. of Units	% On Project	Total Leasing Cost (\$)		
Item 1			0%	0		
Item 2			0%	0		
Item 3			0%	0		
Subtotal, Leased Equipment					0	
Subtotal, Purchased or Leased Equipment						0
III. Expendable Materials & Supplies						
Description	Cost (\$)					
Item 1						0
Item 2						0
Item 3						0
Item 4						0
Item 5						0
Item 6						0
Item 7						0
Item 8						0
Item 9						0
Item 10						0
Subtotal, Expendable Materials & Supplies						0

Format of the Proposed "Total Budget" Form (continued)

PROPOSED PROJECT BUDGET						
Company name: 						
Project duration: months						
IV. Travel						
Foreign Travel						
Destination	Purpose	Cost Per Person Per Trip (\$)	No. of Trips	No. of People Per Trip	Duration Per Trip (days)	Cost (\$)
Dest. 1			0			0
Dest. 2			0			0
Dest. 3			0			0
Dest. 4			0			0
Dest. 5			0			0
Dest. 6			0			0
Subtotal, Foreign Travel			0			0
Domestic Travel						
Destination	Purpose	Cost Per Person Per Trip (\$)	No. of Trips	No. of People Per Trip	Duration Per Trip (days)	Cost (\$)
Dest. 1			0			0
Dest. 2			0			0
Dest. 3			0			0
Subtotal, Domestic Travel			0			0
Subtotal, Travel						0
V. Subcontractors						
Service to be Performed	Name of Subcontractor	Country of Service	Cost (\$)			
Subcont. 1			0			
Subcont. 2			0			
Subcont. 3			0			
Subcont. 4			0			
Subcont. 5			0			
Subcont. 6			0			
Subtotal, Subcontracts			0			
VI. Consultants						
Service to be Performed	Name of Consultant	Hourly Rate (\$/Hr.)	No. of Hours	Country of Service	Cost (\$)	
Consult. 1			0		0	
Consult. 2			0		0	
Consult. 3			0		0	
Consult. 4			0		0	
Consult. 5			0		0	
Consult. 6			0		0	
Subtotal, Consultants			0			
VII. Other Expenses						
Description	Cost (\$)					
Item 1	0					
Item 2	0					
Item 3	0					
Item 4	0					
Item 5	0					
Subtotal, Other Expenses			0			
Subtotal budget, before G&A Expenses						0
General & Administrative Expenses (G&A) @5%						0
Total Project Budget for Company						0
Projected Expenditure, by Segment						
	Segment Duration (months)	% of Total Budget	Projected Expenditure (\$)			
First segment			0			
Second segment			0			
Third segment			0			
Fourth segment			0			
Fifth segment			0			
Sixth segment			0			
Seventh segment			0			
Total	0	0%	0			

I. Direct Labor

Gross Annual Salary - the current salary plus social ("fringe") benefits of employees expected to work on the project. The maximum annual salary (including social benefits) for a full-time position accepted is \$125,000 for Israeli companies and \$175,000 for U.S. companies. Typically, staff may include engineering and technical personnel, R&D documentation, and marketing personnel. The budget should NOT include corporate executives, secretarial staff, legal staff, or administrative staff. The overhead allowance covers such expenses. An exception to the above will be made for corporate executives in small companies with a specific (usually technical) role in the project and will be typically approved by BIRD in those cases on a part time basis.

% on Project - the average portion of any given worker's time spent directly on the project throughout the entire project, given as a %.

Cost to Project - a computed item, the product of the Gross Annual Salary (including social benefits) X % on project X number of months on the project / 12.

Overhead (O/H), at the rate of 25% on the total direct labor, is a computed item to compensate for other personnel who are considered indirect.

II. Equipment

Depreciation – this budget item refers to depreciation allowance on capital equipment employed and not to capital expenditures. The depreciation allowance equals the purchase cost of the equipment item being employed (an input item given in \$/unit) X number of units employed (an input item) X % of the time in which the equipment is employed on the project (an input item) X the annual depreciation rate (in % per year). The annual depreciation rate currently allowed is up to 33.3%.

The Leasing Cost equals the monthly lease cost or rental cost of capital equipment (an input item given in \$/unit/month) X the number of units leased/rented (an input item) X % of the time in which the leased/rented equipment is employed by the project (an input item) X project duration (in months).

III. Expendable Materials & Supplies

List and describe each major item or groups of related items categorized as expendable materials and supplies.

IV. Travel

Travel expenses should be classified as either foreign or domestic travel. In either case, the trips should be itemized by the destination and the purpose of the trip, which should be described in a few words.

The cost (\$) is the cost per person per trip (an input item in \$) X the number of people per trip (an input item) X the number of trips of the same kind taken throughout the project (an input item). The duration per trip (in days) is just an informative data item.

V. Subcontractors

The budget should identify each subcontractor, the service to be performed, the country in which the service will be given and the cost of each service. Explain the basis for the costs.

VI. Consultants

The budget should identify each consultant, the nature of the consulting activity, the country in which the service will be given, the hourly rate upon which the charge will be made (an input item given in \$/hr.) and the estimated number of consultant hours (an input item).

VII. Other Expenses

"Other Expenses" typically include exhibits, regulatory activities, standards certifications, field trials, patent registration costs, market surveys or other miscellaneous expenses not covered by any of the previous expense categories.

Patent registration costs are allowed at up to \$30,000. Legal fees related to patent activities are not accepted.

General & Administrative Expenses (G&A), computed at 5% over the subtotal budget, represent various operating overhead items such as rent, utilities, etc.

Projected Expenditure, by Segment

The overall project period is organized in (equal, if possible) Segments of ideally 6 months each, for the purpose of monitoring, reporting and payment of the conditional grant funds. For each segment in the project, please specify the segment duration (6 months, unless otherwise approved by BIRD) and the estimated relative expenditures for the segment (given as % of the total budget). Please note that the total segments duration must equal the total overall project duration and that the % of total budget for all segments must sum to 100%.

Once you have finished calculating the budgets for both partners, please enter the Total Project Budget for each partner.

Israeli partner Total Budget = (\$)_____

U.S. partner's Total Budget = (\$) _____

Total Project Budget = (\$)_____

Please note: Neither partner's portion in the combined budget can be less than 30% of the total.

M. Risk Analysis

1. Use the following tables to describe the main risks of the project.
2. TABLE 1A: Identify at least 5 main risks. The table can be extended to add additional risks, but not more than 10. Number the risks and give each one a short identification name. Keys for probability ranking and for evaluating impacts are provided in the 4 small tables, hereinafter.
3. TABLE 1B: Describe each of the identified risks concisely. Use additional space, if needed for clarity. Risks can be of different types, as exemplified in the explanation to TABLE 1B. Other types may be used by adding them to the explanations.

Note: The Tables' template can be found as a Word file, downloadable from BIRD's website.
Do not make any changes to the template.

RISK ANALYSIS TABLES

Do not change format (color & font size)

TABLE 1A

Risk #	Name/Description	Ranking	Impact		
			Duration ¹	Budget ²	Commercialization Potential ³
1					
2					
3					
4					
5					

TABLE 1B

Risk #	Name/Description	Type*
1		
2		
3		
4		
5		

*Type: Technical (T), Project Management/Resources (M), External to the Project (E)

Ranking	Probability of Risk Occurring
High	Above 50%
Medium	30 – 49%
Low	10 – 29%
Very Low	1 – 10%

Impact	Duration ¹
High	Above 6 months
Medium	3 to 6 months
Low	Below 3 months

Impact	Budget ²
High	Above 20% increase
Medium	10% to 20% increase
Low	Below 10% increase

Impact	Commercialization Potential ³
High	Above 50%
Medium	30% to 50%
Low	1% to 29%

1. Duration of project extended by the given amount
2. Cost of project increases by the given percentage
3. Forecasted sales in the next 3 or 5 years reduced by the given percentage

N. Sundry Information – Mandatory

To enable the Foundation to prepare the CPFA on a timely basis following approval of the grant application by BIRD's Board of Governors, please provide the following information in the proposal itself:

Venue for the applicable law governing the CPFA between the companies and the Foundation, i.e., one of the States of the U.S. or Israel, as agreed upon by the companies.

Israeli Company

Project Manager -

Full name and title: _____
 Position in company: _____
 Email address: _____
 Direct number: _____
 Mobile number: _____

Fiscal Information Official -

Full name and title: _____
 Position in company: _____
 Email address: _____
 Direct number: _____
 Mobile number: _____

U.S. Company

Project Manager -

Full name and title: _____
 Position in company: _____
 Email address: _____
 Direct number: _____
 Mobile number: _____

Fiscal Information Official -

Full name and title: _____
 Position in company: _____
 Email address: _____
 Direct number: _____
 Mobile number: _____

O. APPENDIX – TRL Definitions

Relative Level of Technology Development	Technology Readiness Level	TRL Definition	Description
System Operations	TRL 9	The actual system operated over the full range of expected mission conditions	The technology is in its final form and operated under the full range of operating mission conditions.
System Commissioning	TRL 8	Actual system completed and qualified through test and demonstration	The technology has been proven to work in its final form and under expected conditions. In almost all cases, this TRL represents the end of true system development. Examples include developmental testing and evaluation of the system. Supporting information includes operational procedures that are virtually complete. An Operational Readiness Review (ORR) has been successfully completed prior to the start of hot testing.
	TRL 7	Full-scale, similar (prototypical) system demonstrated in a relevant environment	This represents a major step up from TRL 6, requiring demonstration of an actual system prototype in a relevant environment. Examples include testing full-scale prototype in the field with a range of simulant. Supporting information includes results from the full-scale testing and analysis of the differences between the test environment, and analysis of what the experimental results mean for the eventual operating system/environment. Final design is virtually complete.
Technology Demonstration	TRL 6	Engineering/pilot-scale, similar (prototypical) system validation in a relevant environment	Engineering-scale models or prototypes are tested in a relevant environment. This represents a major step up in a technology's demonstrated readiness. Examples include testing an engineering scale prototypical system with a range of simulant. Supporting information includes results from the engineering scale testing and analysis of the differences between the engineering scale, prototypical system/environment, and analysis of what the experimental results mean for the eventual operating system/environment. TRL 6 begins true engineering development of the technology as an operational system. The major difference between TRL 5 and 6 is the step up from laboratory scale to engineering scale and the determination of scaling factors that will enable design of the operating system. The prototype should be capable of performing all the functions that will be required of the operational system. The operating environment for the testing should closely represent the actual operating environment.
Technology Development	TRL 5	Laboratory scale, similar system validation in a relevant environment	The basic technological components are integrated so that the system configuration is similar to (matches) the final application in almost all respects. Examples include testing a high-fidelity, laboratory scale system in a simulated environment. Supporting information includes results from the laboratory scale testing, analysis of the differences between the laboratory and eventual operating system/environment, and analysis of what the experimental results mean for the eventual operating system/environment. The major difference between TRL 4 and 5 is the increase in the fidelity of the system and environment to the actual application. The system tested is almost prototypical.

BIRD Foundation Procedures Handbook

Technology Development	TRL 4	Component and/or system validation in a laboratory environment	The basic technological components are integrated to establish that the pieces will work together. This is relatively "low fidelity" compared with the eventual system. Examples include integration of ad hoc hardware in a laboratory and testing with a range of simulants and small scale tests. Supporting information includes the results of the integrated experiments and estimates of how the experimental components and experimental test results differ from the expected system performance goals. TRL 4-6 represent the bridge from scientific research to engineering. TRL 4 is the first step in determining whether the individual components will work together as a system. The laboratory system will probably be a mix of on hand equipment and a few special purpose components that may require special handling, calibration, or alignment to get them to function.
Research to Prove Feasibility	TRL 3	Analytical and experimental critical function and/or characteristic proof of concept	Active research and development (R&D) is initiated. This includes analytical studies and laboratory-scale studies to physically validate the analytical predictions of separate elements of the technology. Examples include components that are not yet integrated or representative tested with simulants. Supporting information includes results of laboratory tests performed to measure parameters of interest and comparison to analytical predictions for critical subsystems. At TRL 3 the work has moved beyond the paper phase to experimental work that verifies that the concept works as expected on simulants. Components of the technology are validated, but there is no attempt to integrate the components into a complete system. Modeling and simulation may be used to complement physical experiments.
	TRL 2	Technology concept and/or application formulated	Once basic principles are observed, practical applications can be invented. Applications are speculative, and there may be no proof or detailed analysis to support the assumptions. Examples are still limited to analytic studies. Supporting information includes publications or other references that outline the application being considered and that provide analysis to support the concept. The step up from TRL 1 to TRL 2 moves the ideas from pure to applied research. Most of the work is analytical or paper studies with the emphasis on understanding the science better. Experimental work is designed to corroborate the basic scientific observations made during TRL 1 work.
Basic Technology Research	TRL 1	Basic principles observed and reported	This is the lowest level of technology readiness. Scientific research begins to be translated into applied R&D. Examples might include paper studies of a technology's basic properties or experimental work that consists mainly of observations of the physical world. Supporting Information includes published research or other references that identify the principles that underlie the technology.

Source: U.S. Department of Energy guidelines (See <https://www2.lbl.gov/dir/assets/docs/TRL%20guide.pdf>)

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