Full Proposal Submission Guidelines

For Applicants Invited to Submit a Full Proposal

Overview

Applicants whose pre-proposals have been approved are invited to submit a full proposal. The full proposal must provide a comprehensive, coherent, and technically detailed plan that demonstrates the project's innovation, feasibility, and potential impact. It must also reflect strong binational collaboration and a clear path to commercialization.

The proposal is submitted via the BARD Online Submission Portal and includes several components to be entered or uploaded into the system, which will prompt and guide applicants clearly. The main body of the proposal should be submitted as a PDF document, with a maximum length of 26 pages. Please make sure to use Arial or Calibri font size 11.

We strongly encourage you to carefully read the [BARD Accelerator Guidebook](#) before beginning preparation of your full proposal.

Please note: Part A and Part B below describe the different technical submission requirements, not a necessary chronological order. However, the first information you must enter after creating an account is Consortium Partners Information.

BARD Online Submission Portal Forms (Part A)

To access the BARD Online Submission Portal and begin your submission process, please create an account and log in.

Applicants are required to *enter* the following information in the relevant fields/forms:

1. **Executive Summary:** Provide a concise overview of the project, summarizing the innovation, its market relevance, and the expected outcomes. Include a description of the participating partners, describe the collaboration structure, and present a market and commercial overview. Please limit this summary to 350 words and do not include it in the Full Proposal document.
2. **Project Title:** Enter the title of your project.
3. **Consortium Partners Information:** Enter this for each partner individually.
4. **Budget by Milestones**: Enter an individual budget for each partner.
   Please read sections 2 and Budget carefully before preparing this

5. **Product Definition:** Clearly describe the Product expected to be developed (max. 550 words).
    This section should explain:
    a. What the Product will be (key functions & main features).
    b. Who will use it and for what purpose.
    c. The key technology it relies on.
    d. The division of intellectual property and commercial rights for the Product between the partners.
    e. How it is expected to reach the market.

The purpose of this description is to ensure we have a shared understanding of the Product so that in the future it will be easy to relate sales and commercial outcomes to this Product. Please describe it in practical, concrete terms – not theoretical or generic.

6. **Academic Institute Approval.**

Documents for Individual Upload to the BARD Online Submission Portal (Part B)

1. The Full Proposal Document (PDF, 26 pages max.)
2. Gantt Chart (PDF or Excel). For specific instructions go to section 2C, page 7.
3. Consortium Agreement
4. Certificate of Incorporation (separately for each Industry Partner)
5. Financial Reports (separately for each Industry Partner)
6. Certificate of Good Standing/W9 (separately for each Industry Partner)
7. Short CVs (3 pages max) for key project personnel. Please compile all CVs into a single document for upload.
8. Bibliography
9. Abbreviation list (optional)

Please provide all documents in PDF format unless stated otherwise.

The Full Proposal Document

The following sections 1–8 must be included in your Full Proposal document.

The Budget and CPFA sections are completed separately and are explained at the end of this document. For detailed guidelines regarding the content and formatting of each section, please refer to the linked instructions. Please remember that the Full Proposal Document is limited to 26 pages.

1. The Innovation (max. 2 pages)

This section should address the following:

a. **Describe the proposed concept**. Sketches, diagrams, and tables may be included to help describe the proposal. 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.

b. **Background information**. Discuss the current state-of-the-art for the target markets, including how things are presently done in this area, any parallel R&D efforts or alternative approaches by others, and the limitations of current market technologies. Explain how these shortcomings set the stage for your proposed innovation, detailing what makes your product unique, why it is expected to be successful, and how it will differ from existing solutions.

c. **Prior art**. What was done till now in order to reach the initial TRL.

d. **Patents.** What is the patent situation, including background patents and the potential for new patents.

e. **Regulation and standards.** Which regulatory and technical standards are relevant to the developed product? Will the proposed product meet current and/or emerging standards?

f. **Prior funding.** If any of the Industry Partners received funding from other Israeli and/or U.S. government agencies (e.g., the Israel Innovation Authority, the NIH, DHS, SBIR, etc.) that supported any part of the development of this innovation in the past five years, please provide the project name, the year of approval, and the amount received as grant.

2. R&D Program (max. 10 pages)

The R&D program is organized in milestones (objectives to be achieved on a specific timeline) and associated tasks (the specific actions to be taken to achieve each milestone). Each milestone on the timeline is paired with the relevant specific set of tasks required to achieve it, including defining expected performance status, and encompassing activities such as prototype development, laboratory and field testing, data analysis, and iterative refinements. These tasks are designed to systematically address technical challenges, validate key success metrics, and ensure alignment with both regulatory and commercial requirements. In this section, please describe in detail the R&D timeline, milestones, tasks, risks, and mitigation measures in keeping with the instructions below. **Please note:** This section also includes elements to be completed in the BARD Online Submission Portal. Your descriptive narrative must correspond to and elaborate on the information submitted in these elements.

a. Milestone Plan

The Milestone Plan serves as a comprehensive roadmap for the project, organizing development into distinct phases with clearly defined objectives, timelines, and deliverables. **The milestone serves also as the points where the budget is reviewed, and payments are approved to the responsible partners associated with the specific milestone**.

Milestone #	Milestone Name	Description (2-3 sentences)	Key Success Metric	Time from Effective Date (month)	Milestone Duration (month)	Milestone Budget USD	Responsible Partner (Choose from partners' list)
1							
	Task #	Task Name	Task Description (1-2 sentences)				**Responsible Partner (Choose from partners' list)**
	Task #	Task Name	Task Description (1-2 sentences)				**Responsible Partner (Choose from partners' list)**
2							

For each milestone, please provide detailed descriptions specifying the techniques and methodologies to be used—such as laboratory testing, field trials, and the number of test repetitions required to validate results. Each milestone should outline the technical tasks to be conducted (see instructions in section below), such as prototype development, iterative

testing cycles, and performance evaluations, with a clear focus on how these activities will support achievement of the key success metrics. The plan should also describe a risk analysis, strategies to address risks and mitigate technical or economic constraints.

 Finally, in your narrative milestone description, please indicate the relevant partner(s) responsible for and involved in each milestone, and include a justification of the budget requested for that milestone.

Milestone & Tasks Table

 Please complete this table in the BARD Online Submission Portal by following the instructions outlined below.

Please pay attention to the following:

a. **Milestone Composition:** At each milestone, certain tasks reach a tangible progress that may provide an evaluation point of the project. <u>A task may span over several relevant milestones</u>. Each milestone in the BARD Online Submission Portal should include clearly defined tasks. Detailed instructions regarding these tasks can be found in the following section, "Technical Task Outlines and Implementation."

b. **Description:** For each milestone, provide a concise description (2–3 sentences) outlining its purpose, scope, and how it fits into the overall project plan.

c. **Key Success Metric:** Clearly state the measurable objectives to be achieved.

d. **Time from Effective Date & Milestone Duration (months)**: Define the duration of each milestone in months and indicate when it will begin relative to the Project's Effective Date (in month). Ensure alignment with the overall project schedule and dependencies between tasks and milestones.

e. **Responsible Partner:** For each milestone, select one or more partners who will be responsible for ensuring the successful completion of the milestone. It is important to note that the budget allocated to this milestone must be assigned to the same responsible partners. Additionally, grant payments will be distributed based on this allocation, ensuring that the partners accountable for the milestone are also the recipients of the corresponding funds.

Risk Analysis: Provide a Risk Analysis for each milestone (up to 5 main risks). Use the table below to detail the risks. Name the risks and give each one a short description. Keys for probability ranking are provided in the small table, hereinafter. Please complete the risk table, embed it in this section, **and** provide a detailed narrative description of the Risk Analysis.

RISK ANALYSIS TABLE

Milestone # X

Risk Name	Description	Ranking	Mitigation Plan

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

In the text of this section, please describe prototypes, lab results, reports, or any other outputs relevant for milestone description under each relevant milestone.

b. Technical Task Outlines and Implementation

Define up to 15 specific and measurable tasks to be carried out throughout the development **and** implementation (see 6b) phases of the project and manually input them into BARD Online Submission Portal under each relevant milestone.

Each task entry should include a brief description, expected completion date, assigned team member, and indicate if consultants or subcontractors will be involved.

In this section of the proposal, you may expand on each task, ensuring the information provided precisely matches the task list and milestones entered into the BARD Online Submission Portal—including task numbers, names, start and end dates, and partner responsibilities. Each task may be undertaken by one or more consortium partners.

Please be sure to address the following:

a. For each task, clearly outline the specific approach and techniques to be used, including the tools, algorithms, or methods for implementation. Specify any required

data sources and tagging processes. Justify the chosen methodology with supporting information—such as preliminary results, validation, or relevant publications—highlighting the technological innovation and rationale behind the approach.

b. For each task, where applicable, please provide a comprehensive understanding of the development challenges associated with advancing the idea to a higher Technology Readiness Level (TRL). Outline strategies to address these constraints, ensuring a practical pathway for progression. Where relevant, provide supporting information to justify the chosen methodology for each task, confirming the rationale behind the selected techniques and approaches.

c. For each task, clearly define a measurable outcome or Key Success Metric that demonstrates completion, ensuring a direct link to key project deliverables. Tasks must include specific success metrics—such as deadlines or quantifiable outputs—to enable consistent and objective evaluation aligned with overall project objectives.

d. In case 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, please provide specific details as to what is to be tested, how many tests are needed, test objectives, test methodology, expected results, etc.

e. In the text of this section, discuss various approaches which are applicable 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.

c. GANTT Chart

Please upload to BARD Online Submission Portal a Gantt chart that outlines all the tasks. The following guidelines should be followed when preparing the chart:

a. The tasks in the GANTT chart **must correspond** to the assigned milestone, task number, name, start date and finish date as entered in the Milestones & Tasks table (please review the submitted table before creating the chart).

b. **Task Responsibility:** For each task, show graphically which of the consortium partners will be responsible for its execution. Since several consortium partners can share responsibility to execute the same task, indicate this graphically as well.

c. **The Program Plan** (GANTT) should encompass the entire duration of the Project.

d. **The time axis** should show increments no smaller than one month.

3. Analysis of the Project's TRL (max. 1 page)

This section aims to establish the project's Technology Readiness Level (TRL) before the project's initiation and following its 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 bridge this gap.

To do so, please review the TRL DEFINITIONS (see APPENDIX A in the Guidebook) 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 must substantiate this assertion with examples.

You are also required to predict the project's TRL following its completion and to justify this prediction based on the project's milestones and deliverables.

4. Commercial and Application Potential (max. 3 pages)

This section serves as a guideline to conduct a thorough market analysis of the proposed project. Its purpose is to demonstrate a clear understanding of how the proposed product fits into the current market landscape, and to assess its feasibility for successful commercialization. The market analysis should address the following areas:

a. **Market Needs:** Clearly identify the specific needs your product addresses. Explain how these needs relate to current industry trends and whether the Industry Partners are currently active in developing and selling similar products. Provide the basis for these market needs. Provide evidence to support your assessment of market demand.

b. **Market Size and Growth:** Determine the current market size in terms of physical units and value in U.S. dollars. Assess the Industry Partners' current and future market share. Estimate the expected market share captured in the first years of product lifetime.

c. **Competition:** Evaluate existing and potential competitors, including their products, performance, and pricing. Consider creating a comparison table to highlight differences. Analyze how competitive dynamics might affect your product's commercialization and clarify your product's unique value proposition.

d. **Regulatory Barriers:** Identify potential regulatory barriers and describe your strategy for overcoming these obstacles.

5. Consortium Collaboration (max. 3 pages)

This section focuses on the projected mode and extent of collaborative activity between the partners. It highlights the importance of collaborative approach and synergies towards R&D, risk-sharing during product development and commercialization. This section should

elaborate on the agreed-upon roles, risk/revenue/profit-sharing, and the business relationship between the consortium partners.

a. Consortium Partners' Capacity

Please be sure to address the following:

a. **Relevant Facilities and Infrastructure**: Describe facilities, equipment, and infrastructure expected to be utilized during the project and commercialization phase.

b. **Integration with Existing Structure**: Assess the extent to which the proposed project can be absorbed into each partner's existing structure and facilities. Identify available staff, equipment, facilities, and the need for hiring, obtaining capital equipment, or expanding manufacturing operations.

c. **Achievements and Significant Milestones**: Mention the partner's achievements in relation to the relevant project's aim such funded research, publication, competitions, prominent board members, and any other achievement that reflects the company's capabilities.

d. **Existing Marketing & Sales Capabilities** demonstrating the ability of the Industry Partner to commercialize the product.

b. Consortium Agreement Summary

This section should include the commercial arrangements between the partners such as licensing rights, royalties, revenue sharing agreements, IP cost cover, repayment of grant and dispute resolution, as described in the Consortium Agreement.
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6. Implementation Plan (max. 3 pages)

This section provides an overview of the key factors involved in bringing the product to market, including further R&D tasks, manufacturing strategies, marketing approaches, sales plans, and the resources required for successful commercialization.

a. Commercialization Plans

Provide a detailed description of the plans that the Consortium, and specifically the Industry Partners, intend to implement to advance the commercialization of the Product during the project and beyond. This should include:

a. **Production**: Will the consortium partners 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?

b. **Marketing and Sales**: What is the planned Go-To-Market strategy? What are your planed marketing activities to support the launch and promotion of the product? Which Industry Partner/s will handle marketing, sales, and sales support? If both, what role will each partner play? What are the current sales activities of the Industry Partners in the target market segments and geographical regions?

c. **Sales and Service Network**: Do the Industry Partners have an existing sales and service network? If not, how do they plan to establish one, and what resources are needed?

d. **Market Share and Sales**: Forecast the expected market share your product will capture in its initial years. Include projected annual unit sales and anticipated selling prices, if possible.

b. Implementation Year Plan

Describe in detail your specific plan for the Implementation Year, which is the 3rd year of the program. Please input the corresponding information into the Milestone & Tasks Table in keeping with instructions listed under the Milestone section and the following additional guidelines:

a. **Milestone Name**: Begin with the word "Implementation."
b. **Key Success Metrics**: Specify one or more tangible milestones—either R&D or commercial—to be accomplished during the Implementation Year. Achievement of these milestones will determine eligibility for the final 10% grant payment.
c. **Budget:** Allocate $100,000 USD.
d. **Time from Effective Date:** 24 months.
e. **Duration:** 12 months.
f. **Task:** Describe the associated tasks relevant to each milestone, following the instructions under the "Technical Tasks Outline and Implementation" section.

7. Relevance to Call for Proposal Themes (max. 1 page)

Explain how the proposed project will address one or more Call for Proposals themes, tackle relevant challenges, and contribute significant progress in this field by project completion.

8. Environmental and Social Impact (max. 1 page)

Clearly articulate how the project will generate positive social and environmental impacts throughout its lifetime and beyond. Elaborate on the expected environmental impact (including negative, if relevant), sustainability of product consumption and production, and contributions to fields such as health, education, poverty, improved nutrition, sustainable agriculture, and any additional relevant fields.

Budget

Reminder: The budget is not included in the Full Proposal document and is completed within the BARD Online Submission Portal as noted in Part A and partially under the R&D section (specifically, Milestones and Tasks). This section is intended to provide clear, detailed instructions for budget development, preparation, and submission—**please read carefully**.

The budget should include all development and marketing expenses directly associated with the project that will be incurred by each partner throughout the project phase. Each partner must submit a separate detailed budget per milestone in the BARD Online Submission Portal (as noted in PART A), following the instructions provided in this section. The system will generate and display an aggregated budget—a summation of the individual budgets, showing total project costs by sections and milestones. The Principal Investigator (PI) must review the aggregated budget.

BARD's funding will begin on the Effective Date, which is defined as the official start date of the project. **Please note:** Expenses incurred before the Effective Date are generally not eligible for reimbursement by BARD. However, there is an exception for long lead items. If these items are specifically identified and justified within the proposal, related expenses may be considered eligible for expenditure and reimbursement. Eligible expenses may be incurred up to 90 days prior to the Effective Date.

Explanation on Budget Preparation

- Before starting the budget-building process, **you should already have**:
  - Entered each partner's details in the BARD Online Submission Portal and set up each partner in keeping with the system instructions.
  - Entered all milestones and relevant tasks in the "Milestone Task Tracking Form" in the BARD Online Submission Portal.
  - Each Partner must first enter its total budget by the categories listed below, before entering the itemized budget. Each item must be associated with the appropriate milestone.
- Each partner is required to develop their budget under four primary categories:
  - **Salaries**: This category should include all personnel costs associated with the project, such as wages for staff directly involved in project activities.
  - **Equipment**: Partners should list all necessary equipment purchases that are essential for the execution of the project.
  - **Operation**: This section encompasses operational expenses, which may include costs for subcontracted services, consultants, patent registration costs, equipment depreciation and leasing costs and other operating needs required to achieve project milestones.
  - **Foreign Travel**: Any travel expenses related to project activities outside the partner's home country should be included here.

Please note:

- Overhead is permitted at maximum 20% of total direct expenses.
- Partner budgets must comply with the regulations regarding what expenses are/not approved. Please review these guidelines in "The Project Budget" Section of the BARD Accelerator Guidebook to ensure adherence while preparing your budgets.
- The values of all expense components from each milestone are aggregated and displayed in the "Total Budget" section of the BARD Online Submission Portal. The Principal Investigator (PI) is responsible for thoroughly reviewing this aggregated budget to ensure that it accurately reflects and aligns with the individual budgets submitted by each partner.
- Only expenses incurred in Israel and in the U.S. may be included in the budget.
- All budget items should be recorded in U.S. dollars and rounded to the nearest $1,000.

Budget Terminology

- **Gross Annual Salary:** The current salary plus social ("fringe") benefits of employees expected to work on the project. The maximum annual salary accepted (including social benefits) for a full-time position is $125,000 for an Israeli Partner and $175,000 for a U.S. Partner. Typically, staff may include engineering and technical personnel, R&D documentation, and marketing personnel. The budget should NOT include corporate executives, or legal or administrative staff. An exception to the above will be made for corporate executives in a small Industry Partner with a specific (usually technical) role in the project and will be typically approved by BARD Accelerator in those cases on a part-time basis.
- **Depreciation of Equipment (under Operation)**: 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%.
- **Leasing Cost (under Operation):** This equals the monthly lease cost or rental cost of capital equipment (an input item given in $/unit/month) X the number of units leased/rented (an input item) X % of the time in which the leased/rented equipment is employed by the project (an input item) X project duration (in months).
- **Foreign Travel:** The trips should be itemized by the destination and the purpose of the trip, which should be described in a few words. The cost ($) 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.

Cooperation and Project Funding Agreement (CPFA)

If your project is approved by BARD Accelerator, a [Cooperation and Project Funding Agreement (CPFA)](#) must be signed between the Consortium and BARD. The CPFA will be prepared by BARD, based on the information already provided by the Consortium in the BARD Online Submission Portal throughout the process. The Consortium will review the CPFA prior to signing to ensure all details match the information provided.

Please note: The following sections from the Full Proposal in their *approved, final version* will be annexed to the CPFA as binding parts of the agreement and **cannot be changed** after approval:

1. Approved Project Budget – Annex A
2. GANTT Chart – Annex C
3. Milestone & Task Table – Annex D
4. Product Definition – Annex E