

Purpose:

The David Loder Legacy Fund was established in honor of David Loder, PTSF's longtime legal counsel and cherished friend to the organization. David served PTSF from its inception in 1985 until his passing in 2025, providing not just legal expertise but wisdom, integrity, and unwavering commitment to the mission of improving trauma care in Pennsylvania.

This fund honors David's 40 years of dedication by supporting initiatives that reflect his values and passions: advocacy for those we serve, professional growth and excellence, and advancement of Pennsylvania's trauma system. The fund provides flexible support for projects and activities that further PTSF's mission in ways that would have been meaningful to David.

1. Eligible Uses

Funds from the David Loder Legacy Fund may be used to support a broad range of initiatives that align with David's legacy and PTSF's mission, including but not limited to:

- A. Advocacy and Policy Initiatives
 - i. Legal advocacy supporting trauma system improvements
 - ii. Policy development and legislative efforts
 - iii. Support for individuals or organizations advocating for trauma care
- B. Professional Development and Education
 - i. Continuing education for PTSF staff, board members, or trauma care professionals
 - ii. Leadership development programs
 - iii. Professional certifications and specialized training
- C. Trauma System Research and Innovation
 - i. Research projects advancing trauma care and outcomes
 - ii. Innovative programs or pilot projects
 - iii. Quality improvement initiatives
- D. Other initiatives that reflect David's commitment to excellence, integrity, and service to Pennsylvania's trauma system may also be considered.

2. Eligibility

The David Loder Legacy Fund is open to internal and external applicants

- A. Internal applicants: PTSF staff or Board of Directors seeking professional development, continuing education, or support for initiatives that enhance their ability to serve PTSF's mission
- B. External applicants: Pennsylvania-based individuals, organizations, healthcare facilities, or trauma centers pursuing projects or activities that align with the fund's purpose and PTSF's strategic priorities.

3. Application Requirements

All applicants must submit a written proposal for consideration by the PTSF Board of Directors.

Written proposals must include:

- A. Project or Activity Information:
 - i. Applicant name and contact information
 - ii. Organizational affiliation (if applicable)
 - iii. Project or activity title
 - iv. Detailed description of the proposed project or activity
 - v. Explanation of how the proposal aligns with David Loder's legacy and PTSF's mission
 - vi. Objectives and expected outcomes
 - vii. Timeline for completion
 - viii. Detailed budget and justification
- B. Letter of support from applicant's institution or supervisor (if applicable)
- C. Any additional supporting documentation relevant to the proposal
- D. For research projects utilizing PTOS data, recipients must also comply with all requirements outlined in Policy TR-113: Requesting PTOS Data from the Central Site
- E. Proposals are to be submitted directly to the PTSF Board of Directors via the PTSF President on a rolling basis and will be reviewed at the next scheduled Board meeting.

4. Review and Approval Process

The PTSF Board of Directors will review and approve expenditures from the David Loder Legacy Fund on a case-by-case basis.

- A. Applications will be evaluated based on
 - i. Alignment with David Loder's values and legacy
 - ii. Consistent with PTSF's mission and strategic priorities
 - iii. Feasibility and clarity of proposed activities
 - iv. Potential impact on trauma care, trauma professionals, or Pennsylvania's trauma system
 - v. Appropriate use of requested funds
- B. Applicants will be notified of funding decisions within ten business days of the Board of Directors' decision.
- C. Board approval is required before any funds are committed or disbursed.

5. Spending Limits

The Board of Directors will determine appropriate spending amounts on a case-by-case basis, considering:

- A. Current fund balance and investment performance
- B. The scope and potential impact of the proposed project or activity
- C. Other funding requests under consideration

- D. The need to preserve the fund's principal for long-term sustainability
- E. The Board retains full discretion to approve expenditures that further PTSF's mission and honor David Loder's legacy, while ensuring responsible stewardship of the fund.

5. Initial Growth

During the fund's initial growth phase, no expenditures will be made until the fund balance reaches \$2,500. The Board will revisit spending parameters annually as the fund grows. Small memorial contributions and donations will be actively solicited and invested to build the fund to a sustainable level that can support meaningful awards while preserving David's legacy long-term.

6. Fund Management

The David Loder Legacy Fund will be maintained as a separate designated fund within PTSF's investment portfolio. Contributions to the legacy fund are tax deductible. Annual reports on the fund balance, investment performance, and expenditures will be provided to the Board of Directors.

7. Recipient Requirements

All recipients of David Loder Legacy Funds must:

- A. Acknowledge the David Loder Legacy Fund in any publications, presentations, or public communications related to the funded activity
- B. Use funds solely for the approved purpose. Any significant changes to the project scope or budget must receive prior PTSF Board approval
- C. Submit a final report within 30 days of project completion describing:
 - i. Activities completed
 - ii. Outcomes achieved
 - iii. Impact on trauma care, professional development, or advocacy efforts
 - iv. How the funded activity honored David Loder's legacy

Original Date: 12/11/2025

Review Date:

Revise Date:

Amy Kempinski, MSN, RN, CEN, TCRN — President