



VOLUME VI

WINTER 2004

No. 2



ANGELA S.M. KUO

Dr. Kuo Honors Late Wife by Establishing Endowment

Giving back comes natural for **Dr. Ken N. Kuo**. Born in Taipei, Taiwan in 1940, Dr. Kuo has spent his professional life finding ways to give. Dr. Kuo is a student, teacher, and giver of his time, talent, and treasure.

On October 27, 2001, Ken lost his wife of 34 years, **Angela S.M. Kuo**. Angie graduated from Deaconess Hospital Medical Technology School in Detroit, Michigan in 1969. She worked at Rush Medical Center from 1969-1972 as a biochemistry research assistant. In 1990 she became a real estate agent and was intently involved in Taiwanese community activities and other Chicagoland organizations; ultimately she served as President of the Taiwanese American Chamber of Commerce of Greater Chicago.

Angie traveled with Ken to various orthopaedic meetings and as a result developed many friends within the community. As a fitting tribute and memorial to Angie, Ken established the Angela S.M. Kuo Endowment at OREF. His generous \$500,000 commitment is in the form of a challenge grant to be directed by the Pediatric Orthopaedic Society of North America for support of high priority research and education programs.

Ken's first partner at Rush, **Dr. Jorge Galante**, remarked, "Ken has always led by example and his decision to establish the Angela S.M. Kuo Endowment at OREF is yet another example of his desire to see that others have opportunities to learn and grow. Ken has made sure that Angie's legacy will live on through this endowment. And Ken will continue to build his legacy both here and abroad through his tireless efforts to give back to the orthopaedic specialty and society in general."

Ken and Angie Kuo made the practice of medicine attractive to their three children. Eugene is an orthopaedic resident at Rush Medical Center who is

married to a pediatrician; Joyce is a pediatrician married to a US Army physician stationed in Heidelberg, Germany; and Christina is an orthopaedic resident at the Hospital for Special Surgery in New York City. Currently Professor of Orthopaedic Surgery at Rush Medical College, Rush University, Chicago, Ken *(continued on page 8)*

STUDY TO FOCUS ON HIP PROCEDURES

Centerpulse Award Recipient Selected



The Orthopaedic Research and Education Foundation awarded **Debra J. Thomas, M.D.** the 2003 Centerpulse (now a part of Zimmer) Orthopedics Minimally Invasive Surgery in Joint Replacement Research Grant.

Currently a resident with The Dorr Arthritis Institute/Centinel Hospital and King-Drew Medical Center, Dr. Thomas will receive the \$15,000 resident research award to study both the physiological and psychological outcomes of patients who have undergone minimally invasive total hip arthroplasty. The five-month study concludes in December when Dr. Thomas reports her findings to Centerpulse Orthopedics.

"I would just like to say 'thank you' for the opportunity to pursue research in an area of interest to me. I plan to continue to make clinical research a part of my future career in orthopaedics," stated Dr. Thomas.

Dr. Thomas also holds a bronze medal in figure skating from the 1988 Winter Olympic Games. ■

Please Visit our Exhibit at the AAOS Annual Meeting

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VOLUME VI

VICTOR M. GOLDBERG, M.D.

FROM THE BOARD CHAIR



OREF 50th Anniversary Plans Underway

Time flies, as the saying goes, and that is especially true when we realize that the 50th anniversary of the establishment of the Orthopaedic Research and Education Foundation (OREF) is fast approaching. During the Annual Meeting of the AAOS in March, 2005, in Washington D.C., we will celebrate that milestone with a day-long series of events designed to emphasize the importance of research to the practice of orthopaedics over the past 50 years, and to consider the potential implications of research in the next 50 years.

The AAOS has graciously agreed to let us plan this OREF Day during the annual meeting for Thursday, March 24, 2005. Our plans include our usual Leadership Breakfast at which we will honor key donors and grant recipients. For the anniversary we would like to also recognize those who had a role in the formation of OREF or representatives of their families. If it had not been for the vision and dedication of those individuals, we would not be enjoying the result of nearly 50 years of research and education in our chosen profession.

Looking Back: The Impact of Research on Our Practice

Following the Leadership Breakfast, we will present a program on *The Impact of 50 Years of OREF Research on Orthopaedics*. We plan to highlight key developments in research and important individuals whose work has had an impact on how we practice medicine. This historical perspective is significant because it is often easy to forget how much we have advanced in a short time, and to overlook how much research has affected the ways we treat patients.

At mid-day we are planning a special luncheon symposium to honor young volunteers, donors, and researchers who we believe will shape the future of OREF, and of the specialty. Perhaps they will have an effect as powerful as that of the founders of OREF.

Looking Ahead: The Future of Orthopaedics

In the afternoon we will shift gears to offer a symposium on *Discovering the Future: The Next 50 Years of Orthopaedic Research*. This will give us a glimpse of

what is on the cutting edge now and what might be in the not-so-distant future. Just think how much our specialty has changed due to new developments in implants, new surgical techniques, the growing role of pharmaceuticals in our practice, genetic research, etc. It wasn't that long ago that same-day arthroscopic procedures were unheard of, or that minimally invasive surgery was only an idea. This symposium will allow some of the best and brightest of the current generation of researchers to offer their thoughts about our collective future. This should be a very exciting and provocative session.

Finally, OREF Day will end with our traditional Shands Circle event, which will be called our *Shands Circle Gala* for the anniversary. This has become a noteworthy event each year during the Academy meeting, and for 2005 we will make it an even bigger and more impressive evening. It should encourage many potential donors to join the Shands Circle just to make sure they can attend.

Your Input Encouraged

Since OREF has been an organization that involves many donors, volunteers, peer reviewers, etc., we'd like to encourage you to participate in our planning for this event. If you have ideas for individuals or developments to recognize, or would like to serve on a planning committee for any of the programs described above, please contact **Gene Wurth** at wurth@oref.org. He will make sure that your input is directed to the right person and that you will be a part of this very special occasion.

As always, we are grateful for the contributions of money, time, ideas, and energy that so many of you make on behalf of OREF. We hope that you have contributed to our 2003 Annual Campaign to support research, and to help ensure the continued vitality of this valuable organization.

On behalf of the Board of Trustees, I offer you and your family the best for a happy and successful year in 2004. ■

SINCE ITS INCEPTION,
OREF HAS AWARDED
1750 GRANTS FOR A
TOTAL OF \$52.3 MILLION.



OREF COLLABORATES
WITH MORE THAN
30 DESIGNATED GIVING
AND ENDOWMENT
PARTNERS.



SHANDS CIRCLE UPDATE

VOLUME VI

CHARLES ROCKWOOD, M.D.

Outstanding Effort Increases Shands Membership

Due to the committed efforts of everyone on the Shands Committee and our OREF staff, we have welcomed more than 50 new Shands members in 2003. This is an outstanding effort and represents the second largest single-year increase in new members since the Shands Circle was created in 1994.

The 2004 Shands Dinner will be held at the Old Federal Reserve Bank in San Francisco on Thursday, March 11, 2004. The recently completed multimillion dollar renovation features 25 foot Corinthian columns adorned with Italian and French marble walls and floorings. What a wonderful setting to celebrate with a fabulous dinner. After dinner, dancing and live music will be provided by *The Black Market Jazz Orchestra*.

Shands Circle members also receive other benefits, including access to OREF's VIP Suite at this year's AAOS Annual Meeting, and priority reservations at preferred hotels for subsequent AAOS Annual Meetings.

I want to express my gratitude to all of you who have stepped up to join the Shands Circle, and I encourage those of you still considering to join immediately, so you may join us for a festive evening at one of San Francisco's premiere settings—and to support a cause that benefits our entire specialty—OREF. ■



THE OLD FEDERAL RESERVE BANK – SAN FRANCISCO

ALFRED R. SHANDS, JR.
CIRCLE

Creative Ways to Contribute to OREF

In addition to joining the Shands Circle, perhaps you're interested in leaving your legacy to OREF—but you're short on cash assets. There are ways to make your unproductive assets become tax savers—whether you want to use these means to leave your legacy gift or to join the Shands Circle. These seldom publicized non-cash opportunities to make charitable gifts may fit your special circumstances—and allow you to increase your support to OREF.

For example, if you are a high-bracket taxpayer you might consider turning an unproductive asset into a major tax-saving deduction—and even bypass the dreaded capital gains tax.

Here are a handful of extraordinary gift possibilities:

- **Option or closely held stock.** You may own highly appreciated option stock or closely held, unmarketable stock. By donating some of your shares, you can realize valuable tax savings and bypass the capital gains tax.

- **Patents.** The tax law favors inventors who contribute patents to charitable organizations. Your donation to OREF is deemed a gift of long-term capital gain property and is deductible at fair market value.

- **Life insurance.** Assign ownership of an obsolete policy to OREF, or name OREF as beneficiary or co-beneficiary of an existing policy. Tax benefits depend on the nature of your gift.

- **Real estate.** Consider an outright gift of developed or undeveloped property you no longer need. Another strategy: A “bargain sale” for less than market value is treated as part sale, part gift.

Regardless of your choice, we'll be glad to help you and your professional advisors determine how you can capture the benefits of exceptional gift opportunities like these. For more information, please contact Senior Vice President, Endowments, **Tom Coffman** at coffman@oref.org or call (847) 384-4349. ■

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ANNUAL GIVING UPDATE

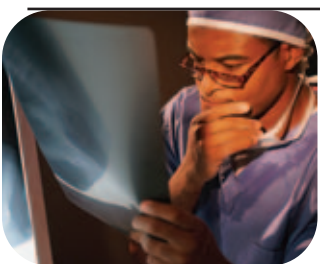


Bernard R. Bach, Jr., M.D.
Vice Chair, Development

On behalf of the OREF Board of Trustees, I thank the more than 2,000 donors who generously contributed to OREF in 2003. Since 1955, OREF has awarded more than 1,700 grants totaling more than \$52.3 million. This vital orthopaedic research is made possible by the generous contributions to OREF from donors nationwide and abroad.

These OREF Trustees and Volunteers are commended for speaking on behalf of the Foundation at meetings held from June to December 2003:

- Michael Clarke, M.D.** – Mid-Central States Orthopaedic Society
- John Clohisy, M.D.** – Missouri State Orthopaedic Association
- David Markel, M.D.** – Michigan Orthopaedic Society
- Bernard R. Bath, Jr., M.D.** – Am. Orthopaedic Soc. for Sports Medicine
- Shepard Hurwitz, M.D.** – Eastern Orthopaedic Association
- Victor Goldberg, M.D.** – Knee Society
- Kenneth Moore, M.D.** – Tennessee Orthopaedic Society
- James Ogilvie, M.D.** – Scoliosis Research Society
- Dennis Gordon, M.D.** – Utah Orthopaedic Society
- Frank Kelly, M.D.** – Georgia Orthopaedic Society
- Robert S. Block, M.D.** – Vermont Orthopaedic Society
- Neil Maki, M.D.** – Louisiana Orthopaedic Association ■



New Hip Replacement Documentary

“For the first time on American television, viewers will be able to witness the drama of lives profoundly changed by total joint replacement,” said **Clifford W. Colwell, M.D.**,

president of the American Association of Hip and Knee Surgeons. “We are very excited about this project that will help educate people about the many benefits of this procedure, which helps thousands of individuals each year.”

AAHKS is spearheading an innovative effort to raise awareness of the benefits of total joint replacement through a television documentary that will bring the story of real patients—their hopes, fears and triumphs—to millions of Americans. The documentary will focus on the dramatic improvements in the quality of life for *(continued on page 8)*

RESEARCH NEWS

NEW: Unified Research Agenda

The Board of the American Academy of Orthopaedic Surgeons (AAOS) has distributed the Unified Research Agenda (URA) that was produced in conjunction with OREF, the Orthopaedic Research Society, COMSS, and the Bone and Joint Decade. The burden of disease and directions for future research are identified for six leading research priorities:

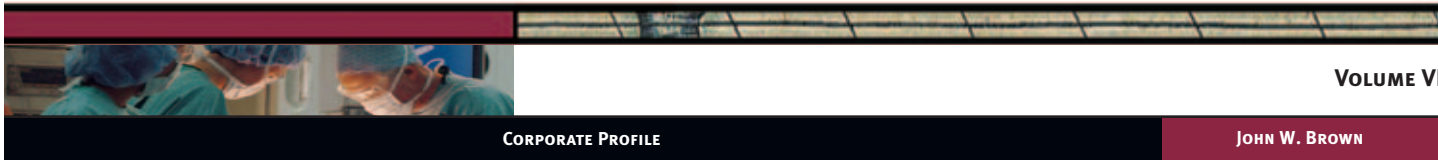
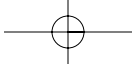
- Osteoarthritis
- Spinal disorders
- Osteoporosis and bone quality
- Major limb trauma
- Soft-tissue injuries and
- Childhood musculoskeletal disorders.

The URA is a resource to the orthopaedic research community that is involved in advocacy efforts to improve the status of funding for musculoskeletal research. To view and download: http://www.aaos.org/wordhtml/research/unified_research_agenda.pdf ■



Research Panel Studies

AAOS has also approved Research Panel Studies covering 17 areas of musculoskeletal research. Each panel study addresses the scope of the research topic, its clinical significance, its importance to the public health, and directions for future research. The introduction highlights dominant research themes. This is a resource for education and advocacy. To view and download: http://www.aaos.org/wordhtml/research/panel_future_directions.pdf ■



Stryker Provides Strong Support to OREF

Headquartered in Kalamazoo, Michigan, Stryker Corporation develops, manufactures and markets specialty surgical and medical products for the global market. These products include orthopaedic implants, trauma and spinal systems, the bone growth factor osteogenic protein-1 (OP-1), powered surgical instruments, endoscopic systems, and patient care and handling equipment. The Company also provides outpatient rehabilitative health services in the United States.

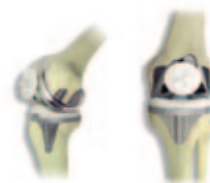


John W. Brown has been the Chairman and Chief Executive Officer of Stryker for more than 25 years. *Impact* spent a few minutes with Mr. Brown, to learn why he and his company are so committed to OREF.



Impact: How do you view the role of OREF in the orthopaedic community?

Mr. Brown: OREF is one of the few entities that provides funds for young researchers. In this regard, OREF plays a critical role because without OREF, there would be a gap in the development of clinician researchers from academia, who go on to perform research funded by industry and NIH.



Impact: What do you think is OREF's strongest point?

Mr. Brown: OREF represents a very noble cause. The organization is not dominated by one school of thought. It is an organization that plays a strong role in orthopaedics and its leadership provides a clear vision for what OREF is seeking to accomplish.



Impact: Please describe the role of OREF in medical device industry research.

Mr. Brown: Stryker has a lot of research projects and researchers for many specific projects. Everyone in the industry should support OREF because OREF fosters the growth of research — from which all industry benefits.



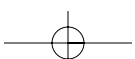
Impact: How do you see OREF's role in patient care?

Mr. Brown: It's important to remember OREF is not just dedicated to research. By its name, OREF is also committed to education. The research and education efforts work together in an indirect way that benefits patient care.



Impact: Would you like to see support from the orthopaedic device companies increase?

Mr. Brown: Yes. Everyone has a stake in orthopaedics. I would like to see many more orthopaedic device companies increase their support to OREF. ■





2003 Corporate Associates



OREF is proud to acknowledge

these distinguished companies

for their generous support.

A strong and productive

alliance with industry enables

OREF to fund quality programs

and projects that bring about

significant advances in the

orthopaedic profession,

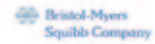
and ultimately, lead to

improved patient care. ■

DIAMOND LEVEL (\$200,000 OR MORE)



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Symmetry Medical

Synthes Spine

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To learn more about the Corporate Associates Program, contact Judy Scherr, VP, Corporate Relations at (847) 384-4356 or sherr@oref.org. These companies had committed their support at the time this publication was printed.

Please Support OREF's 2004 Annual Fund

ORTHOPAEDIC
RESEARCH AND
EDUCATION
FOUNDATION



PERSONAL DATA (Print name clearly as you wish to be recognized in the OREF Annual Report)

Name: _____

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 ZIP: _____ Phone: _____
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B BUSINESS (Practice Group or Institution)

Address: _____

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C ANNUAL GIVING LEVELS: Order of Merit: \$1,000

and up (Summa Cum Laude: \$5,000 or more; Magna Cum Laude: \$2,500-\$4,999; Cum Laude: \$1,000-\$2,499); Honor Roll: \$500-\$999; Supporting Member: Up to \$499.

- Enclosed is my check for the 2004 calendar year in the amount of \$ _____.
- I would like to pledge \$ _____ for 2004.
- Please remind me of my pledge during the month of _____.
- Charge my contributions of \$ _____ to my: Visa Mastercard AMEX

Signature: _____

Print name as it appears _____

on credit card: _____

Account No. _____

(For AMEX: Please include both embossed and printed numbers, and AMEX Credit Card billing address)

City: _____ State: _____ ZIP: _____

Expiration Date: _____

- Please send me an Order of Merit Certificate.

D MEMORIALS AND TRIBUTES

(Please check one): My contribution is in:

- Memory of Tribute to

Honoree: _____

Please send an acknowledgement of this memorial/ tribute to: _____

Address: _____

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E ENDOWMENT INFORMATION

(Please visit www.oref.org for the most current endowment listings.)

I wish to make a contribution of \$ _____ to an existing OREF endowment: _____

(Print clearly the name of the endowment.)

- Please contact me about establishing an endowment.
- Please send me information about the Alfred R. Shands, Jr. Circle.

F OREF'S SPECIALTY DESIGNATED GIVING PROGRAM

Order of Merit members (contributions of or exceeding \$1,000 annually) have the opportunity to designate support for specialty societies through their annual contribution to OREF.

NOTE: Contributions less than \$1,000 may not be designated.

I understand that a minimum of **\$500** of my annual Order of Merit contribution is **UNRESTRICTED**. Please designate the following amounts to the societies as indicated below:

- \$ _____ American Academy of Orthopaedic Surgeons
- \$ _____ American Association for Hand Surgery
- \$ _____ American Association of Hip and Knee Surgeons
- \$ _____ American Foundation for Surgery of the Hand
- \$ _____ American Orthopaedic Association
- \$ _____ American Orthopaedic Foot and Ankle Society
- \$ _____ American Orthopaedic Society for Sports Medicine
- \$ _____ American Shoulder and Elbow Surgeons
- \$ _____ American Spinal Injury Association
- \$ _____ Arthroscopy Association of North America
- \$ _____ Cervical Spine Research Society
- \$ _____ Hip Society
- \$ _____ International Society of Arthroscopy, Knee Surgery, and Orthopaedic Sports Medicine
- \$ _____ J. Robert Gladden Orthopaedic Society
- \$ _____ Knee Society
- \$ _____ Limb Lengthening and Reconstruction Society
- \$ _____ Musculoskeletal Tumor Society
- \$ _____ North American Spine Society
- \$ _____ Orthopaedic Rehabilitation Association
- \$ _____ Orthopaedic Research Society
- \$ _____ Orthopaedic Trauma Association
- \$ _____ Pediatric Orthopaedic Society of North America
- \$ _____ Ruth Jackson Orthopaedic Society
- \$ _____ Scoliosis Research Society

For more information, please contact Ed Hoover at hoover@oref.org
 6300 North River Road, Suite 700 • Rosemont, IL • 60018-4261
 (847) 698-9980 • www.oref.org

OUR MISSION

The Orthopaedic Research and Education Foundation (OREF) is an independent organization that raises funds to support research and education on diseases and injuries of bones, joints, nerves, and muscles. OREF-funded research enhances clinical care, leading to improved health, increased activity, and a better quality of life for patients.



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Dr. Kuo Establishes Endowment (continued from page 1)

decided in early 2003 to accept a new challenge, and an opportunity to give something back in his homeland. He accepted the position at National Health Research Institute as Executive Director of the Forum and P.I. at the Division of Health Policy Research in Taipei.

The Forum, similar to the Institute of Medicine in the United States, is a think tank for governmental public health policy and will disseminate advanced health knowledge, including medical education policy and guidelines. Ken was chairman of the Graduate Education Committee at the Forum for the last three years. When the position of Executive Director became vacant Ken was considered the best choice. As Executive Director of the Forum Ken will manage five committees in various health-related issues and continue his endeavor in graduate medical education. As P.I. Division of Health Policy Research, Ken will have assistants and funds to conduct mission-oriented research. Ken will continue his pediatric

orthopaedic practice and teaching at the National Taiwan University Hospital.

For information on how you may contribute to this endowment, please contact **Tom Coffman**, Senior Vice President, Endowments at coffman@oref.org or call (847) 384-4349. ■

New Hip Replacement Documentary (continued from page 4)

patients who have had joint replacement surgery, and will be targeted for distribution through the Public Broadcasting System and appropriate cable-television channels.

Organizations and individual donors who have committed to major grants in support of the documentary include: Zimmer Inc., Centerpulse, Stryker Howmedica Osteonics, DePuy Orthopaedics, Smith and Nephew Orthopaedics, OREF and **Dr. and Mrs. Dane Miller.** ■