

Part II will be published in a future issue.

PART I

Partnering with Industry in New Ways



Near the end of 2008, OREF introduced a new program to generate industry support for post-graduate education and training of orthopaedic surgeons while addressing new regulatory requirements and complying with best practices.

The OREF Clinician Development Program (CDP) provides three types of institutional grants — supporting continuing medical education (CME) programs, graduate medical education (GME) fellowships, and residency enhancement programs — plus individual research grants. The program's grant-making process was reviewed and approved by federal monitors for the three largest device makers, and quickly resulted in seven partnerships between OREF and industry. As of Oct. 16, 2009, partner companies include: **Biomet, Inc.; DePuy Orthopaedics, Inc.; De Puy Spine; DJO Incorporated; Smith & Nephew, Inc.; Synthes, Inc.; Tornier, Inc.; and Wright Medical Group, Inc.**

From conversations with OREF's CDP corporate partners, grant recipients, and others, this series looks at how this new program is contributing to the vigorous pursuit of knowledge and rigorous training that are hallmarks of orthopaedic medicine.

DESIRE TO SUPPORT

In 2008, changes resulting from Department of Justice probes, including deferred prosecution agreements with four device companies and the possibility of federal regulations, led to diminished support by the orthopaedic industry for educational and research programs.

"There were programs that industry supported that could not continue because of the Department of Justice regulations," said **Mr. Carl Winnebald**, vice president of Professional and Institutional Affairs for Biomet.

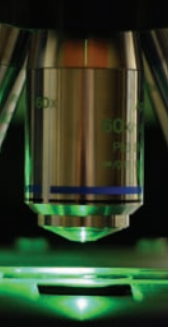
According to Mr. Winnebald, the inability to fund the programs put a financial crunch on the hospitals and teaching institutions, and a reduction or cancellation of GME fellowships.

"Because of the aging population, in the next 20 years there's going to be an even greater need for fellowship-trained surgeons than there is today," Mr. Winnebald explained. "Partnering with OREF will ensure fellowships continue to receive funding."

LEARNING FROM EXPERIENCE

OREF's longtime experience as an independent grant-making organization played a large role in engaging industry to support the CDP.

"Smith & Nephew is dedicated to the advancement of orthopaedic innovation, education, and patient care," said **Mr. Joseph M. DeVivo**, president of Smith & Nephew Orthopaedics. "Formalizing our relationship with OREF allows Smith & Nephew to continue supporting orthopaedic research and education in a comprehensive way while working with an organization dedicated to its mission, independence, and integrity. OREF's history of working productively with many orthopaedic societies and institutions makes this an especially good choice."



FREE FROM INFLUENCE

By supporting OREF’s CDP, industry partners are able to fund fellowships and other educational endeavors without influencing the evaluation and selection of recipients.

Said **Ms. Jean Bjerke**, director of education and grants programs for DePuy, “The more specialized a physician becomes, the better he or she is going to be as a surgeon in the specific areas of the body, giving patients better surgical outcomes. We believe in the education of fellows and residents and we do want to support them, but we thought it was necessary to remove the industry bias and fund them through our partnership with OREF.”

Added **Mr. Doug Kohrs**, president and CEO of Tornier, “What attracted me to OREF’s Clinician Development Program was the opportunity to promote fellowships in shoulder and elbow surgery, while doing it in a non-biased way.”

Three orthopaedic surgeons free from financial or managerial conflicts of interest with industry for at least two years comprise the OREF Educational Grants Board, which determines award criteria and makes final funding decisions. **Frank B. Kelly Jr., M.D., Jo A. Hannafin, M.D., Ph.D., and William C. McMaster, M.D.**, were appointed to serve in 2009.

In July 2009, OREF awarded full funding — \$75,000 each — to 39 fellowship applicants and, after receiving additional support, funded 11 fellowship applications at \$25,000 each. Additional CDP grants were awarded in September (see page 15), providing support for residency programs in 2009-2010 and CME offerings in hip and knee arthroplasty in 2009. In addition, one CDP research grant in adult reconstruction will be awarded in March 2010 through OREF’s peer review process.

WHAT DETERMINES FUNDING

The number and type of grants awarded, and the subspecialty or clinical focus, are determined by how participating corporate partners allocate their support.

Fellowship grant recipients for 2009-2010 are recognized on page 15 and online at www.oref.org/cdp.

FELLOWSHIPS AWARDED IN 2009

Fellowships by Category	Applications Funded	Applications Submitted
Funded at \$75,000		
Adult Reconstruction	23	29
Foot and Ankle	4	12
Hand Surgery	1	15
Shoulder and Elbow	7	10
Trauma	4	9
Funded at \$25,000		
Oncology	2	6
Spine	2	6
Sports Medicine	7	36
Total	50	123

The number and type of fellowships available are a function of how companies have allocated the support they have committed thus far. As the program grows, it is likely that industry supporters will provide more funding in more categories, and more fellowships and a broader mix of subspecialties may be offered. For what types of fellowships or CME programs does your institution need funding? Complete a survey at www.oref.org/cdp to help OREF make the case for support.

OREF CLINICIAN DEVELOPMENT PROGRAM: Selection process for fellowship grants

As described in promotional materials and in the grant applications, the OREF process for selecting fellowship recipients is based on a purely random and donor-blind selection system. The process involves three basic steps.

First, the OREF Educational Grants Board screens all applications to ensure that they meet the threshold requirements set out in the application form. Second, those who meet all of the criteria, i.e. ACGME accreditation or satisfaction of similar requirements, constitute the qualified candidate pool from which recipients are randomly selected, the number selected determined by available funding. Finally, selected applications are randomly matched with funds provided by participating corporate supporters.

Through this system, OREF is able to ensure that every qualified applicant has an equal opportunity to receive funding, that no donor bias enters the process, that no organization is favored over another, and that corporate support is assigned to recipients in a manner that complies with applicable law.

Companies interested in supporting GME fellowships, CME courses, residency enhancement programs, or research grants through OREF's Clinician Development Program should contact:

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"OREF has always been devoted to advancing all of orthopaedics, and is actively seeking additional partners to expand the number of fellowships across the broad range of sub-specialties," said OREF Board Chair **William P. Cooney III, M.D.** A multi-year commitment could also provide more support for GME fellowships and CME programs in a greater number of subspecialties.

"We anticipate expanding our support for the various subspecialties," Carl Winnebal of Biomet said. "We're going to watch that, certainly, year after year, and will make adjustments where we think it's necessary."

In fact, OREF is asking any institution desiring education funding to help demonstrate the need for more support by responding to brief surveys that will help the Foundation in its conversations with current and prospective corporate partners. To complete the survey(s), please log on to www.oref.org/cdp.

AN UNMET NEED

OREF launched the first phase of its Clinician Development Program in March 2009, inviting applications for GME fellowship grants. The 126 fellowship applications OREF received represented requests for \$9.225 million — nearly three times the \$3.2 million available — a clear demonstration that the CDP addresses an unmet need.

Grants for 2010-2011 — Phase I Complete

Applications were received through October 13 for three types of institutional grants providing funding for:

- 2010 CME programs in hip and knee arthroplasty
- 2010-2011 orthopaedic residency enhancement programs (all subspecialties/practice areas)
- 2010-2011 GME fellowships in eight subspecialty/practice areas excluding spine care

Grants for 2010-2011 — Phase II in Progress

Applications are invited through December 15 for up to 25 graduate medical education fellowships in spine care.

All recipients of 2010-2011 CDP grants will be announced March 10, 2010. For more information, please visit the OREF Web site at www.oref.org/cdp.