



discovering the future of orthopaedics

## Orthopaedic Research Unites Family, Links Generations

Orthopaedic research has been among the ties that bind **Nancy E. Ferguson, R.N.** and her family. Mrs. Ferguson discovered OREF through her daughter, **Cristin M. Ferguson, M.D.**, and soon after gave a major gift as a way to honor the memory of her husband, **Robert J. Ferguson, M.D.**, and his twin brother, **William T. Ferguson Jr., M.D.**

"Several years ago I was at the AAOS Annual Meeting with my daughter, Dr. Cristin Ferguson," Mrs. Ferguson recounted. "I was

visiting some of the scientific exhibits and picked up some materials about OREF. I was very impressed with OREF."

That encounter led Mrs. Ferguson to make a \$100,000 gift to OREF in 2003, through a **charitable remainder trust (CRT)** that benefits Mrs. Ferguson now, and funds orthopaedic research later. Mrs. Ferguson's gift also qualified her for membership in the Shands Circle.

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**Robert J. Ferguson, M.D. (left) and William T. Ferguson Jr., M.D.**



**Dr. Freddie and Mrs. Hilda Fu**

## Desire for Gender Equity, Passion for Orthopaedics Encourage \$1 Million Gift

Between two operating rooms, where he will see six patients before lunch, **Freddie H. Fu., M.D.**, the David Silver professor and chairman of the Department of Orthopaedic Surgery at the University of Pittsburgh School of Medicine, excitedly explains the necessity of examining anatomy before deciding what type of procedure to use on a patient who has torn her ACL.

A few miles away, at Point Park University where she is director of summer programs, **Mrs. Hilda P. Fu** breezes through narrow corridors. Pausing briefly every few steps, she exchanges greetings with her colleagues. Like her husband, she is eager to share her passions.

### Equally Important Passions

Dr. Fu's passion is orthopaedic research — especially clinically based research. Mrs. Fu's is gender equity. Although these topics may seem different, it was the Fus' passions for these topics, and their ability to tie them together, that drove them to make a \$1 million gift to OREF.

"Gender equity is a very important thing to me personally," Mrs. Fu said. "I support Freddie because I know that orthopaedic research is

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# Help Improve Patient Care by Funding More Research through OREF



**Charles A. Rockwood Jr., M.D.**  
Board Chairman

Since 1955, OREF has funded more than 2,500 grants and awards, which have led to advances in orthopaedic treatments, giving patients improved health, increased activity, and a better quality of life. These advancements in care are a result of research.

Without your contributions to the Annual Campaign, we cannot support research. Contributions made to the OREF Annual Campaign support research and educational grant applications in the next calendar year.

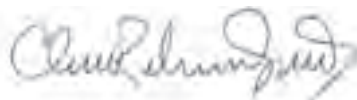
In the last 10 years OREF's peer review committee has rated about 30% of the more than 1,000 received applications in the fundable range, meaning they were of sufficient quality to deserve support. Unfortunately, because of a lack of resources, we were only able to support about half of these.

**What great discoveries will be missed if we do not provide more support for research in orthopaedics?**

These discoveries can help all of us better fulfill our mission of improving patient care. Please consider a contribution to OREF's Annual Campaign to fund more applications. Contributions can be made by:

- Sending your check or credit card information with the form on page 15 of this issue of *Impact*
- Logging on to [www.oref.org](http://www.oref.org) and clicking *Donate Now*
- Contacting **Ed Hoover**, Associate Vice President, Development, at [hoover@oref.org](mailto:hoover@oref.org) or (847) 384-4354

Thank you for your support.



Charles A. Rockwood Jr., M.D.  
Board Chairman

Annual Campaign contributions have helped to support research such as:

**Marc F. Swiontkowski, M.D.**

Resident Research Award Recipient  
Career Development Award Recipient  
OREF Clinical Award Recipient

**Topic:**

Studied the specific types of internal fixation in hip fractures.

**Patient Care Application of Results:**

Improved hip prosthetics, making them less likely to loosen once they are implanted.

**William H. Harris, M.D.**

Research Grant Recipient

**Topic:**

Researched tetracycline labeling to study metabolic bone diseases.

**Patient Care Application of Results:**

Patients can be treated for osteoporosis, a condition in which bones decrease in mass with increasing age, causing them to become fragile. Such treatments can reduce the risk of fractures or other injuries.

**About Impact**

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## Platinum Level Shands — Legacy Gifts to Advance Orthopaedic Research

**D**uring 2006, OREF has added five new Shands Circle Platinum Level Donors — those whose gifts of cash, stock, retirement assets, insurance benefits, or estate assets total \$1 million or more. The Platinum Level is the highest level of donor recognition at OREF, and we are very proud so many have decided to make investments in the future of orthopaedics with such generous support.

The new Platinum Level donors for 2006 include: **Michael J. Axe, M.D.; Dr. Freddie H. and Mrs. Hilda Fu; Dr. and Mrs. James C. Chow; Dr. Frank and Mrs. Carol Raymond;** and the **Dr. and Mrs. Charles Rockwood Family.**

We have added 13 Shands Circle Platinum donors since 2000. While we are proud of that growth we also are humbled by the trust these donors have placed in us. We are very excited to have them share in the vision of OREF as a pre-eminent source of research funding for promising young investigators.

### Legacy Gifts

Many of these gifts will be dedicated to individual research awards, such as an OREF Research Grant, a Clinician Scientist Award, or a Career Development Award; each bearing the name of the donor or donors. By creating such awards, the donors establish permanent support for young researchers, and ensure that they have left their own legacy in orthopaedics. A *Dr. John and Mrs. Mary Smith Research Award* funded as a \$1 million endowment within OREF means there will always be one additional \$50,000 per year research grant at OREF, and a permanent recognition of Dr. and Mrs. Smith.

### Gift Planning Tools

Creating such gifts can be surprisingly easy due to the number of planned giving tools available. Some of our current gifts have been funded by cash paid over a number of years, either from the individual or a family foundation.

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**Gene R. Wurth**  
President and CEO



Contact OREF

For more information about joining the Shands Circle Platinum Level with a Legacy Gift, please contact:

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(847) 384-4362

**Ed Hoover**  
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**Joseph C. McCarthy, M.D.**  
Chairman,  
Shands Circle Committee

## Mark Your Calendars for the 2007 Shands Circle Gala

It is hard to believe that the 2007 Annual Meeting is just a few short months away. Soon it will be time again to learn about the advancements and innovations in our specialty. It will also be time to socialize with our peers who we don't have the opportunity to see as often as we would like.

Held in the Oceanfront Ballroom at the Hotel Del Coronado, Coronado, Calif., OREF's 13th Annual Shands Circle Gala will provide a beautiful setting to become reacquainted with friends while enjoying the sights of crystal chandeliers and tapestry draperies topped off by panoramic views of the Pacific Ocean.

To maximize the amount of donated funds available to support research, the OREF Shands Circle Committee has recommended that those attending the Shands Circle Gala pay a reasonable amount to offset part of the cost of the evening. A survey of Shands Circle members showed that more than 90% of those who responded agreed. For 2007, \$125 per person is the amount we

request for the dinner and reception, and \$35 is the amount for the reception only. This should make more than \$35,000 available for 2007 research grants.

You will receive your invitation and registration information early in January 2007. Registration will also be available online at [www.oref.org](http://www.oref.org).



## New Law Helps You Plan Retirement and Giving: The PPA

On Aug. 17, 2006, President Bush signed into law new tax incentives for charitable gifts from donors who are 70½ or older. **The Pension Protection Act of 2006** encourages financial support of charitable organizations across the United States.

Under the law, you can make a lifetime gift using funds from your individual retirement account (IRA) without undesirable tax effects. Previously you would have had to report any amount taken from your IRA as taxable income, then take a charitable deduction for the gift, but only up to 50% of your adjusted gross income. In effect, this caused some donors to pay more in income taxes than if they didn't make a gift at all.

Now you can make a gift to OREF through an IRA — simply and without tax complications. Plus, you can make the gift today — while you are living and able to witness the benefits of your generosity.

You may contribute funds this way if:

- You are age 70½ or older
- The gift is \$100,000 or less each year
- You make the gift on or before Dec. 31, 2007
- You transfer funds directly from an IRA or Rollover IRA
- You transfer the gift outright to one or more public charities

*"Under the new law, you can make a lifetime gift using funds from your individual retirement account (IRA) without undesirable tax effects."*





We hope to see you there, and that 2007 is even more successful for the Shands Circle. As of October 12, 2006 the Shands Circle included more than 460 members, including 24 who became part of Shands in 2006.

Sincerely,

Joseph C. McCarthy, M.D.

Chairman, Shands Circle Committee

### 13th Annual Alfred R. Shands Jr. Circle Gala

February 15, 2007

Hotel Del Coronado  
1500 Orange Ave.  
Coronado, California

Reception: 6 p.m.  
Dinner: 7 p.m.  
Live music and dancing: 8 p.m.

**Black Tie Optional**



Contact OREF

To learn how to join the Shands Circle, or for more information on how to make a major gift to OREF, please contact:

**Gene Wurth**  
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(847) 384-4362  
[wurth@oref.org](mailto:wurth@oref.org)

**Ed Hoover**  
Associate Vice President,  
Development  
(847) 384-4354  
[hoover@oref.org](mailto:hoover@oref.org)



### **An Example of How The New Law Works**

Pat, aged 73, has \$450,000 in an IRA and has pledged to give OREF \$75,000 this year. If Pat transfers \$75,000 to OREF from the IRA, she will avoid paying income tax on that amount. She cannot, however, claim a charitable deduction — it is a pure wash. Pat has found an easy way to make a major gift to OREF without tax complications.

If she desired, Pat could give more than \$100,000. The legislation allows a maximum \$100,000 gift in both the 2006 and 2007 tax years. So Pat could give \$100,000 each year. If her spouse has an IRA and is 70½ or older, he can also give up to \$100,000 each year.

### **How to Make a Gift**

Contact your IRA custodian to transfer your desired gift amount to OREF, a 501 (c) (3) tax-exempt organization under the Internal Revenue Service tax code.

### **For More Information**

For more information, please contact your financial planning advisor or OREF.



## Desire for Gender Equity, Passion for Orthopaedics Encourage \$1 Million Gift continued from page 1

one of his significant, most important passions. But I am hoping also that by a family gift to OREF, we could in turn have some impact by funneling the money to support new initiatives that would level the playing field for women in the area of orthopaedics."

Mrs. Fu currently serves as board chair for the Women and Girls Foundation, a Pittsburgh-based organization she and several other women founded about four years ago. The mission of the Women and Girls Foundation is to bring about gender equity by supporting initiatives that Mrs. Fu hopes will bring about systemic change.

"We are not using the social services approach where you put a bandage over whatever is bleeding. We want to use instead the opportunity to partner with other organizations."

Mrs. Fu hopes that her gift to OREF could be one partnership to move toward gender equity in the field of orthopaedics.



**Freddie H. Fu, M.D. and Mrs. Hilda P. Fu**

"I would be very interested in having the funds help women be successful as orthopaedic surgeons," she said. "I think there are lots of barriers for women in the field. It could be because of problems ranging from mentality to the lack of girls who go into math and science at a young age. Hopefully this gift can make an impact in removing any kind of entry barriers to the field of orthopaedics, which is still male dominated."

**Constance R. Chu, M.D.**, director of the Cartilage Research Program at the University of Pittsburgh, and a clinician scientist herself, agrees that more women are needed in the field.



**Dr. Fu is teaching the resident doctors, "The ACL is composed of two functional bundles, the AM bundle and the PL bundle."**

"Nationally only about 3% of orthopaedic surgeons are women," said Dr. Chu. "But I believe there are a lot of researchers among them, and it would be nice to hear about more female clinician scientists."

Mrs. Fu does not want to bring about change only for the sake of gender equity. She believes that by enlarging the pool of clinician scientists in orthopaedics, the number of talented researchers will increase. This, she says, will not only serve the issue of helping women succeed as orthopaedic surgeons, but also strengthen the field.

"It's not just equity for equity's sake, but it really is also serving a practical purpose of strengthening orthopaedics in general."

The best way to bring about systemic change in the field of orthopaedics, Mrs. Fu believes, is by partnering with other foundations, something she thinks would be beneficial for OREF.

"If you partner with local foundations that have missions that align with your giving objectives, it's as if you have a lot of branch offices working on that particular issue. By partnering, OREF could make a dent in gender equity for orthopaedics."

### **The Best Outcome**

Although Mrs. Fu acknowledges that her support was instrumental in making the \$1 million gift to OREF, she says that her husband supports her passion for gender equity just as she supports his for orthopaedics.

"Throughout the years my husband has become quite supportive of gender equity. Until he met me he didn't realize that things were not really equal. But poor Freddie, he married me and all of a sudden,



throughout the years as I discovered things were not equal, he got the idea, too. He's really supportive of my passion now. So it works well together."

Dr. Fu agrees.

"It's satisfying and gratifying to fund research through OREF. If funding OREF means that more opportunities are available for women, then we would have better quality research because there would be more talented orthopaedic surgeons doing the work."

Allowing more orthopaedic surgeons in general to become researchers is important to Dr. Fu's passion for orthopaedics and for the importance of outcomes research.

"Unless you can prove that a certain surgical procedure means a better outcome for the patient, why use the technique?"

*"I am hoping that by a family gift to OREF, we could in turn have some impact by funneling the money to support new initiatives that would level the playing field for women in the area of orthopaedics."*

— Mrs. Hilda P. Fu

### The Double Bundle

Dr. Fu was one of the first orthopaedic surgeons in the United States to perform the double bundle procedure for reconstructing his patients' ACLs, a procedure he believes to be better than the more common single bundle procedure.

"Doors have three hinges. If you replace only the middle hinge, you cannot expect it to hold up as well. If you replace only one of the ligaments in the knee, it's like putting only the middle hinge on the door."

Anatomic studies conducted at the University of Pittsburgh Department of Orthopaedic Surgery have shown that the ACL is made up of two bundles, the anterior medial (AM) bundle and the posterior lateral (PL) bundle. In a single bundle procedure, only the AM ligament is replaced. With the double bundle procedure, two holes are made in the cartilage, and grafts are placed through these holes, replacing both bundles.



**Dr. Fu operates. The monitor shows a metal probe being used to expose the PL bundle.**

Dr. Fu believes the double bundle procedure comes closer to reproducing the natural human anatomy, which will mean better outcomes for the patient. This belief was inspired by the late **Jack C. Hughston, M.D.**, who emphasized the importance of anatomy in orthopaedics. According to Dr. Hughston: "Whenever you are having your anatomy sessions pay particular attention, because orthopaedics is all anatomy, plus a little bit of common sense."

Dr. Fu has adopted this concept, using it to describe why he thinks the double bundle procedure will produce better results than the single bundle.

"The double bundle is anatomical ACL reconstruction. If you pay attention to the anatomy, the procedure is more like natural human anatomy," explained Dr. Fu. "You compare it to a transplant, say a liver transplant. You can use half of a liver and that works because it's biological. Half of a liver can still secrete the appropriate enzymes. But with orthopaedics, it's more mechanical, so you want to reproduce natural anatomy as best you can for the best outcome."

Basic science research conducted on the double bundle procedure so far has confirmed Dr. Fu's reasoning, but clinical studies are needed to measure the outcome for patients. The issue is currently a topic of discussion among the orthopaedic community, and while some orthopaedists agree with Dr. Fu, others are not certain that the double bundle procedure is the best method for repairing ACLs.

Dr. Fu believes that what the clinical studies will find is that the double bundle procedure will give patients better kinematics — as full a range of motion as a naturally healthy knee.

"We can fix the knee, but we've been able to do that for a long time. What if we could fix the knee and the patient could go back to playing sports as they did before? We must improve the outcome of treatments, and to do that we have to look at results."

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## Desire for Gender Equity, Passion for Orthopaedics Encourage \$1 Million Gift

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The University of Pittsburgh Medical Center Neuromuscular Research Laboratory, where Laboratory Director **Scott M. Lephart, Ph.D., A.T.C.** says tests have been devised to study the outcomes of the double bundle procedure, will be instrumental in this research. In addition to using equipment to test patients' range of motion, patients will be asked about their recovery. (No OREF funds have been provided for this research).

"Patients will interact with computers to answer questions before and after surgery. The questions will be tailored according to how long post-surgery they are," said Dr. Lephart. A few weeks after surgery, they'll be asked what types of physical activities they could resume, and a few months later we'll do the same with questions tailored for that point in their recovery."

From this information, Dr. Lephart says, they should be able to describe outcomes and assess what factors make the double bundle procedure ideal, and what factors do not.

*"Orthopaedics is often overlooked by the NIH, and OREF provides unique opportunities for a clinician scientist to get a jump start to collect data to use when applying for NIH grants. Funding research helps train young people who are the future of orthopaedics."  
— Freddie H. Fu, M.D.*

### A Passionate Gift

This process, Dr. Fu says, is why research is important, and he believes without OREF research would be compromised, especially for the clinician.

"Orthopaedics is often overlooked by the NIH and OREF provides unique opportunities for a clinician scientist to get a jump start to collect data to use when applying for NIH grants. Funding research helps train young people who are the future of orthopaedics," said Dr. Fu. "There are only a few things in life that are truly special for you and orthopaedics is one of those things for me. In orthopaedics, the future takes money for research."

With their \$1 million gift to OREF, Dr. and Mrs. Fu have helped secure this future, and they hope that the gift can also bring about change toward an equal environment in the specialty for men and women. ■

## Platinum Level Shands — Legacy Gifts to Advance Orthopaedic Research

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Others are estate gifts, such as an outright bequest or a trust arrangement. Some are by insurance policies and one is from a stream of royalty income. There are many ways to create such Legacy Gifts.

### The Role of OREF

The staff at OREF can discuss with you your own interest in supporting research with a Legacy Gift, and the ways that financial planning best works for you. We have access to several very good financial planners, including several whose only clients are physicians, so they know the medical world very well.

For more information about joining the Shands Circle Platinum Level with a Legacy Gift, please contact **Gene Wurth** at wurth@oref.org or (847) 384-4362, or **Ed Hoover** at hoover@oref.org or (847) 384-4354.

Sincerely,



Gene R. Wurth  
President and CEO

### Planned Giving

Vehicle	Description
1) Bequests	Directed assets transferred to OREF. May include cash, stock, or property.
2) Charitable Lead Trust	If your goal is to provide an inheritance for your children, but you would also like to make a significant charitable gift through your estate, a charitable lead trust can help you satisfy both objectives.
3) Charitable Remainder Trust	A charitable remainder trust can increase your income, reduce your taxes, unlock appreciated investments, rid you of investment worries, and ultimately provide very important support.
4) Retained Life Estate	One of your valued possessions, your home, can become a valued gift to us even while you are still living in it, and even if you want your spouse or other survivor to live there for life. This arrangement is called a retained life estate.



## Orthopaedic Research Unites Family, Links Generations

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**Robert J. Ferguson, M.D.**

"My husband loved medicine and loved his family, so becoming a Shands member brought that together," said Mrs. Ferguson.

Her involvement with OREF also helps Mrs. Ferguson continue a family tradition.

"I knew that my daughter had received a grant from OREF when she was a resident, which helped her with her training. That, in addition to my husband and his twin brother both having been orthopaedic surgeons, made me feel like OREF was an excellent way to continue our family's involvement in orthopaedic medicine. I also

learned that my brother-in-law was a life-long supporter of OREF. He apparently supported OREF very early on."

Dr. Cristin Ferguson, an assistant professor in orthopaedics at Wake Forest University, Winston-Salem, N.C., is a clinician/researcher and a graduate of the University of Michigan Medical School, Ann Arbor, Mich., the same institution where Mrs. Ferguson taught medical surgical nursing for five years.

Dr. Cristin Ferguson's interest in orthopaedic research was fueled during her residency under **Regis J. O'Keefe, M.D.** at the University of Rochester, Rochester, N.Y., and furthered during her Sports Medicine Fellowship at the Hughston Clinic in Columbus, Ga.

"The research my daughter did under her OREF grant concerned the molecular biology of cartilage and growth factors," explained Mrs. Ferguson. "When my daughter completed her research, I was

able to attend the presentations that she and the other residents had to make about their findings, and I was so impressed."

Continuing her research originally funded by an OREF grant, Dr. Ferguson is working to develop a tissue-engineered meniscus replacement to help treat patients with meniscus deficiency.

Mrs. Ferguson pointed out that while Dr. Cristin Ferguson is the first in the family to pursue orthopaedic research, she is not the first to reap its rewards.

"My husband and brother-in-law were both general orthopaedists. My husband was in private practice in Bay City, Mich. since 1964. **They didn't do research, but they benefited from it, as all orthopaedic surgeons do. In fact, I was interested to learn through some of the literature from OREF how much of orthopaedics has grown out of research.**"

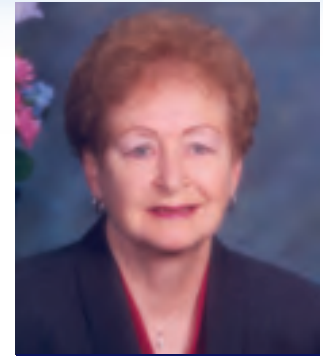
Mrs. Ferguson is confident that the current generation of investigators is up to the challenge research brings.

"The young people are so fantastic and the work they are doing is so important!" Mrs. Ferguson said. "OREF grants are helping them start their careers, and perform work that will benefit patients in the long run. I was thoroughly impressed. OREF is a great organization with a wonderful purpose."

Mrs. Ferguson chose to give to OREF through a CRT. CRTs provide some income for the donor, and another beneficiary if desired, with a wide range of tax benefits.

"I've been trying to get more involved with estate planning since my husband passed away, and to take a more active role in making financial decisions. I wanted to learn more about what I could do to support OREF, so I contacted my attorney. It took a while to get through all the options, but in the end I chose a charitable remainder trust. It supports OREF and I do get some income until I'm deceased."

For more information about charitable remainder trusts and other planned giving options, please contact **Gene Wurth** at wurth@oref.org or (847) 384-4362 or **Ed Hoover** at hoover@oref.org or (847) 384-4354. ■



**Nancy E. Ferguson, R.N.**



**Dr. Cristin Ferguson is working to develop a tissue-engineered meniscus replacement to help treat patients with meniscus deficiency.**

**The picture shows normal meniscus (left) and processed allograft (right) scaffold devoid of cells prepared for implantation. Chemical processing is applied to allograft tissue to improve incorporation and success of meniscus transplantation.**



**Cristin Ferguson with her father at age 2 (left), Cristin M. Ferguson, M.D. today (right).**

## Synthes Expresses Gratitude for Benefits of Research as Top-Level Corporate Associate

For more than 20 years, **Synthes** has supported OREF, for the last three as a top-level Platinum — \$200,000 and above — Corporate Associate, a familiar tradition for the 30-year-old corporation.

According to **Mr. James Gerry**, senior vice president, Synthes, this tradition began in 1984 when **Mark B. Coventry, M.D., Howard Rosen M.D., Phillip G. Spiegel, M.D., and Jerome M. Cotler, M.D.** paid a visit as representatives of OREF. Though Synthes was then a small operation, Mr. Gerry said, its leaders realized the importance of OREF's mission to fund research and education to improve patient care.

"We realized how important the mission of OREF is to the future of orthopaedics, and we agreed to become a corporate associate, and have remained an enthusiastic supporter of OREF ever since," Mr. Gerry said. "I think we're very gratified to participate in a medical specialty where everyone's goal is ultimately the improvement of care for the musculoskeletal patient. Certainly research is vital in this endeavor, and basic research through OREF leads to clinical and applied research, which results in improved patient care."

Partnering with a not-for-profit foundation to promote initiatives for the advancement of patient care is common territory for Synthes, where the importance of research, education, and development was first revealed through its relationship with the Swiss-based Arbeitsgemeinschaft für Osteosynthesefragen (AO), or in English, Association for the Study of Internal Fixation. This partnership has existed for more than 30 years.



"We're affiliated with the AO Foundation, whose activities are heavily oriented toward research and education" explained Mr. Gerry. "Therefore, our corporate culture here at Synthes embraces the OREF goals of improved patient care through education and research. And I think OREF has a uniquely independent approach to supporting research with no other agenda and that certainly appeals to us."

The AO Foundation is a Swiss-based not-for-profit organization led by international surgeons specializing in the treatment of trauma and other disorders of the musculoskeletal system, with its main activities being research, development, documentation, and education. Synthes is a global company that specializes in the fields of orthopaedic, spine, craniomaxillofacial, and veterinary surgery. The company is the exclusive licensee of internal fixation implants and instruments evaluated and approved by the surgeons of the AO Foundation. Synthes also provides financial and logistical support for the AO Foundation's postgraduate courses for surgeons, which teach the principles and techniques of fracture and reconstructive surgery.

From this partnership, Mr. Gerry said, Synthes has learned the value of working with a foundation whose mission is centered around education and research.

"All of the orthopaedic device industry and orthopaedic community benefit from improved methods of treatment, which can result from successful research. One of the things I've observed about orthopaedics over the years is the wonderful collaboration between clinical practitioners, scientific researchers, academic teachers, and industry. By enhancing one component of this — research — all of the stakeholders benefit in the long run," he said.



*James Gerry, senior vice president, Synthes*



But with opportunities to support research projects through other organizations, why does Synthes choose to do so through OREF? According to Mr. Gerry, it is OREF's independent approach and peer review process for selecting grants that attracted Synthes.

"It's gratifying to have a mechanism like OREF to use some of our research expenditures, knowing that each project selected by OREF

*"By enhancing one component of this — research — all of the stakeholders benefit in the long run."*

has been carefully analyzed, and chosen based on merit and the potential positive future impact on orthopaedics."

Mr. Gerry said it would be difficult to imagine what would happen to research initiatives without OREF's peer review process, which he believes fills the important need of selecting the research applications that hold the most promise for practical benefits. And he would like other orthopaedic device companies, both new and established, to understand this need.

"I'm on the board of Health Volunteers Overseas, and one of the things I do is to spend some time contacting people at companies — especially orthopaedic companies — on their behalf to explain



*Synthes, West Chester, Pennsylvania*

*"It's gratifying to have a mechanism like OREF to use some of our research expenditures, knowing that each project selected by OREF has been carefully analyzed, and chosen based on merit and the potential positive future impact on orthopaedics." — James Gerry, senior vice president, Synthes*

why it makes sense for them to help contribute to this worthwhile organization. I feel the same way about OREF."

This is in part because Mr. Gerry believes that OREF represents the foundation for the future of orthopaedics.

"It's a strategic value to all commercial participants in this very special industry. With all the compliance issues going around these days, I think OREF is a really good place to put funds when you're looking to support orthopaedic education and research."

Mr. Gerry said that he hopes with more support OREF can continue to expand the number of projects and programs it is able to fund in the future, and he thinks this is possible as long as OREF continues to publicize the positive outcomes of the research it funds, and encourages companies to support specific projects and programs that coincide with their interests.

"OREF does represent something important to all of us at Synthes, and we look forward to continuing our relationship in support of this worthwhile foundation."



## Corporate Associates

OREF is proud to acknowledge these companies for their generous support. A strong and productive alliance with industry enables OREF to fund quality programs that advance the orthopaedic profession, ultimately leading to improved patient care.

### Platinum (\$200,000 & above)



### Gold Level (\$100,000 - \$199,999)



### Bronze Level (\$10,000 - \$49,999)

ArthroCare	Genzyme Biosurgery	Symmetry Medical
Bayer	Globus Medical	Tornier
Champion Exposition Services	Merck	SanuWave
Exactech	Ortho Biotech	Wright Medical

### Copper Level (\$1,000 - \$9,999)

Aesculap	ESKA America	Orthopedic Network News
Aptic Superbones	Hapad	Pacific Research Labs/Sawbones
Arimed Orthopaedics	Innomed	PAK Manufacturing
Arthrex	Kinamed	Paragon Medical
BioMimetic Therapeutics	Knowledge Enterprises	Precimed
Blackstone Medical	Maine Orthopaedic Review Course	Scheck & Siress
Doncasters Medical Technologies	OrthoLogic	TissueLink
Encore Medical	Orthopedic Imaging Partners	Zimmer Thomson Associates



## Survey Shows How Orthopaedists Manage Pain — Findings from OREF/AOA Pain Management Initiative to be printed in orthopaedic journal

OREF and the American Orthopaedic Association (AOA) have collaborated on a Pain Management Initiative that is designed to determine practice patterns in orthopaedists' management of pain in patients who have had total joint replacement (TJR), sports, or spine-related surgery.

Made possible through an educational grant provided by Pfizer Inc, this Initiative was comprised of a survey hosted at [www.oref.org](http://www.oref.org), which asked orthopaedists about their use of pain management products, technologies, and techniques. During the Annual Meeting of the American Academy of Orthopaedic Surgeons in March 2006 in Chicago, preliminary results from 525 completed surveys were presented to an Advisory Panel of orthopaedic surgeons specializing in TJR, sports medicine, and spine surgery. Surveys remained online through June.

The findings will be published in an orthopaedic journal by early 2007. The report will incorporate summarized data from completed online surveys as well as recommendations from the Advisory Panel. This Initiative aims to identify areas in musculoskeletal pain management that warrant state-of-the-art patient care.

The published summary of the Pain Management Initiative will include information about:

- Which sources orthopaedic surgeons turn to for information on particular pain therapies or medications
- The factors that have an influence on surgeons' willingness to switch to new products or therapies
- Other medical disciplines participating on pain management teams
- How satisfied surgeons are with their pain therapy options
- What pain management modalities surgeons prefer to use
- Reasons why some pain management therapies fail, according to surgeons
- How long surgeons think pain management treatments should last post operatively
- New technologies surgeons believe hold the most promise as pain management therapies
- Guidelines or protocols surgeons believe are needed with respect to the management of post-operative pain in their patients

## Charitable Contribution

As industry continues to adhere to the ethical guidelines recommended by the AdvaMed Code of Ethics and the Pharma Code, OREF would like to remind you that charitable contributions are an accepted part of these recommended guidelines.

According to the AdvaMed's Code of Ethics:

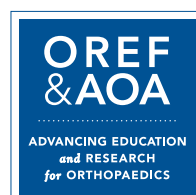
"Members may make donations to charitable organizations for a charitable purpose, such as independent medical research, indigent care, patient education and public education, and sponsorship of events where proceeds are charitable."

OREF, a 501 (c) (3) charitable organization, provides a safe harbor for corporate partners to support research and education.

For more information about the Corporate Associates Program, please contact:

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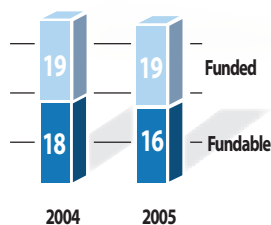


"... and even though they thought my research proposal had merit, they just didn't have enough funding to go around."

"Talk about the one that got away."



The next one that gets away could be another Marshall Urist.



In 2004 and 2005, we funded 38 research grants. However, 34 applications in the fundable range were not supported.

**Marshall Urist, M.D.** received two OREF grants that were instrumental in the development of Bone Morphogenetic Protein (BMP). If we hadn't had the funds to support Dr. Urist at that early stage who knows what might have happened?

In 2004 and 2005, through our peer-review process modeled after the NIH, we had 34 applications rated fundable that we did not support. *Why?* — We ran out of funds. Who knows what potential breakthroughs we may have missed? Are we missing out on the next Marshall Urist?

Last year, 1,200 orthopaedists supported OREF's Annual Campaign. Annual Campaign revenue is the primary source to fund research and educational grants in ensuing years. We thank those of you who've supported the Annual Campaign. And we encourage everyone to consider a generous gift in 2006.

To contribute, please visit us at [www.oref.org](http://www.oref.org) or contact **Ed Hoover**, Associate Vice President, Development, at [hoover@oref.org](mailto:hoover@oref.org) or (847) 384-4354; or **Katie Carter**, Annual Giving Coordinator, at [carter@oref.org](mailto:carter@oref.org) or (847) 384-4352.



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*Discovering the Future of Orthopaedics*



# Please Support OREF's 2006 Annual Campaign



The **most cost-effective** way for OREF to process your donation is through our **secure online donation** form at [www.oref.org/donate](http://www.oref.org/donate)

## Personal Data

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

Name: \_\_\_\_\_

## A Preferred Address: Home Business

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

## B Annual Giving Levels:

<b>Order of Merit—Platinum</b>	\$5,000 & Above
<b>Order of Merit—Gold</b>	\$2,500-\$4,999
<b>Order of Merit—Silver</b>	\$1,000-\$2,499
Bronze	\$500-\$999
Copper	Up to \$499

Enclosed is my check for the 2006 calendar year in the amount of \$ \_\_\_\_\_ .

I would like to pledge \$ \_\_\_\_\_ for 2006.

Please remind me of my pledge during the month of \_\_\_\_\_ .

Charge my contribution of \$ \_\_\_\_\_ to my:  Visa  Mastercard  AMEX

Signature: \_\_\_\_\_

Print name as it appears on credit card: \_\_\_\_\_

Account No. \_\_\_\_\_

Expiration Date: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please send me an **Order of Merit** Certificate.

## C 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: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

## D Designated Giving Program for Annual Giving\*

**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** to OREF. I have indicated below the total amount I'd like to designate to OREF and to these specialty societies:

\$ _____	<b>OREF</b>	\$ _____	KS
\$ _____	AAOS	\$ _____	LLRS
\$ _____	AAHS	\$ _____	MagSoc
\$ _____	AAHKS	\$ _____	MAOA
\$ _____	AANA	\$ _____	MSTS
\$ _____	AOA	\$ _____	NASS
\$ _____	AOFAS	\$ _____	OLC
\$ _____	AOSSM	\$ _____	ORA
\$ _____	ASES	\$ _____	ORS
\$ _____	ASIA	\$ _____	OTA
\$ _____	ASRM	\$ _____	POSNA
\$ _____	ASSH/AFSH	\$ _____	RJOS
\$ _____	CSRS	\$ _____	SICOT
\$ _____	EOEF	\$ _____	SOA
\$ _____	HS	\$ _____	SOMOS
\$ _____	ISAKOS	\$ _____	SRS
\$ _____	JRGS	\$ _____	WOA
		\$ _____	<b>Total Gift</b>

\*For details about Shands Circle membership or about contributing to endowment funds, please contact:

**Gene Wurth**  
(847) 384-4362  
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**Ed Hoover**  
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For more information about the Annual Campaign, please contact:

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## New Tax-Saving Opportunity

On Aug. 17, 2006, President Bush signed into law new tax incentives for charitable gifts from donors who are 70½ or older. **The Pension Protection Act of 2006** encourages financial support of charitable organizations across the United States. Under the law, you can make a lifetime gift using funds from your individual retirement account (IRA) without undesirable tax effects. For more information please turn to page 4.



[www.oref.org](http://www.oref.org)