



# SRS NEWS

April 2006

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## President's Report

A number of exciting things are happening or are on the horizon as we continue the process of implementing the new Strategic Plan that was developed during Randy Betz's term. As mentioned in my report in the last newsletter, we have developed a set of committee policies to support both the Strategic Plan and efforts to improve the governance of our Society. I'm happy to report that the committees are in place, in accordance with those guidelines and are working well. The number of committee members has increased significantly. Currently, 168 members – or almost 20% of our current membership – are serving on committees. Forty-three committee positions are represented by Candidate members serving one year terms, and there are 20 members from outside North America on various committees.

Committee activities are the foundation of our society. Later this year, we will be implementing an online committee application process. Members will be able to review the committees, their charges, and the vacancies and apply for a committee of their choice. We are also working to improve the committee evaluation process that was put into place last year. My hope is that these efforts will keep the committees strong and active while increasing opportunities for more interested members to participate.

Almost all of the committees were represented at the Cabinet Meeting in early January and a lot of excellent ideas were generated. Following that meeting, members of the Executive Committee reviewed suggested strategies, prioritized them and assigned them to primary and in some cases, secondary committees. Those strategies and action plans have now been incorporated into the committee charges. I'd like to thank all of the members who made the effort to travel to Dallas for one and one-half days of intensive work. Their efforts will help move us toward our "Big, Hairy Audacious Goal" and will make the SRS stronger and more valuable. As a reminder, the current Strategic Plan is located in the "Members Only" section of the SRS Web site.

Although all of the committees are working on im-

portant tasks, I'd like to highlight a few who are embarking on some potentially large, far-reaching projects. First, a new Task Force has been appointed to work closely with the new Database Committee. The Study Group Task Force, made up of Oheneba Boachie-Adjei, Jack Flynn, and Peter Newton, and chaired by Larry Lenke has been asked to "investigate the feasibility of industry support for an SRS infrastructure for research in order to coordinate efforts and avoid duplication and, if such an infrastructure is deemed feasible, to recommend a plan for development and possibly conducting society supported research projects."

Three committees that are tackling major reviews of SRS activities and policies are the Bylaws and Policies Committee, Industry Relations Task Force and Web site Committee. The Bylaws and Policies Committee, chaired by Ian Stokes, has been charged with a complete review of the bylaws, since there have been numerous minor amendments and changes over the years, but no overall review since 1966. They are working to ensure that we are in compliance with all current laws and regulations and will also try to separate "policy" items that can be changed as needed from true "bylaws" that should remain consistent for longer periods of time.

George Thompson is chairing the Industry Relations Task Force, which, as the name indicates, is taking a long, hard look at our relationship with industry. Their charge is to develop guidelines and policies including proper disclosures to allow a positive and ethical relationship that will be beneficial to SRS, to our corporate partners, and ultimately to our patients through increased and/or improved research and education. While recognizing that corporate support is important to SRS activities, we want a program that SRS members can be proud of, that industry will be comfortable with, and that will stand up to any outside scrutiny. The guidelines for disclosures will include not only the presenters of papers and faculty of the educational events (i.e. the Annual meeting, IMAST, regional courses, etc.) but also the Board of Directors, council chairs and other appropriate members.

**President's Report**, *continued on page 2*



## SRS Mission Statement

The purpose of Scoliosis Research Society is to foster the optimal care of all patients with spinal deformities.

**President's Report**, *continued from cover*

The Web site Committee, with John Smith as the Chair, will be at the forefront of implementing the Strategic Plan as nearly every SRS committee has been asked to make better use of the Web site to disseminate information to our members and to the general public. While other committees are working on specific articles and information for the site, the Web site Committee is looking at the general format, ease of navigation, quality and quantity of content, and various other factors to come up with a plan for a site that will be truly valuable for members, non-member health care personnel, and the general public.

In addition, the Patient Education Committee, chaired by Linda d'Andrea, is working on a plan to make SRS the undisputed number one source for patient information worldwide regarding spinal deformities. They are looking at delivery of information through a variety of means, including printed pieces, the society Web site and possibly courses or seminars for patients. The SRS also committed to continue with the efforts Nate Lebwohl began last year, to complete the historical portion of the Web site and work toward an SRS archives. Please look at your libraries and send any information about items you can donate to the SRS historical site.

This will be one of our busiest years ever from an educational standpoint. Following the success of the "bonus educational events" during last year's Annual meeting, the Program, Education, IMAST, Research and Global Outreach Committees have planned to offer multiple opportunities during the Annual meeting in Monterey as well as at IMAST and other locations. More information on these events will be included with the Annual meeting materials and IMAST program. In addition to the Annual meeting in September and IMAST in July, SRS will be sponsoring two Worldwide Regional Courses in May and co-sponsoring two courses with AAOS in June. The Worldwide Courses consist of a three

day course in Istanbul, May 25<sup>th</sup> through the 27<sup>th</sup>, and a one and one-half day course in conjunction with the South African Spine Society meeting in Cape Town on May 31<sup>st</sup> and June 1<sup>st</sup>. The SRS-AAOS Course, "Current Trends in Treatment Methods in Pediatric and Adult Spinal Deformity", will be presented in New York and in Costa Mesa, California on June 9<sup>th</sup> and 10<sup>th</sup>. Information on any or all of these activities is available through the SRS office or on the Web site.

One of our most important, ongoing efforts is the Endowment Fund Drive. With the commitment of the new members of the Board of Directors, I am proud to announce that the entire Board of Directors and council chairs have now contributed to the Endowment Fund at the Shands Level (\$20,000 or more). We hope to be able to include the leadership of the committees at that level in the near future. Our commitment to research is part of what makes SRS such a unique and important group. That research has helped all of us provide better care for our patients. I want to remind our international members that SRS research grants are available to members outside the US. Last year SRS was able to provide grants totaling over \$300,000 – but we received requests for more than \$1 million. The only way we can continue to fund worthwhile research is to continue to build our endowment fund. We have four years left to achieve our "10x10" goal of \$10 million by 2010. We need the support and contributions of every single member in order to reach that goal.

In the next newsletter, I will be discussing other issues including our new relationship with AAOS and our advocacy effort. Please mark down your calendars for the upcoming events and plan to attend. Please call me with any comments or suggestion you may have.

Thank you,  
Behrooz

## 2005 Corporate Support

The SRS is pleased to acknowledge those companies who have provided financial support throughout the past year. This support has come in the form of gifts and grants to the Annual Meeting, IMAST, Global Outreach Scholarships for the Annual Meeting, Global Outreach Course, the Edgar Dawson Scholarship Fund, SRS Traveling Fellowships, and the Research Endowment Fund. We sincerely appreciate each of these companies, who are helping the SRS fulfill its goals of providing education and fostering research.

### Diamond Level Support

  
a Johnson & Johnson company







### Gold Level Support



Spine

### Silver Level Support

EBI Spine, Kyphon

### Bronze Level Support

Aesculap, NuVasive, TranSI, Inc., Zimmer Spine

### Donor Level Support

Abbott Spine, Blackstone Medical, Osteotech, Paradigm, Sentient Medical Systems

# Secretary's Report

Committees, committees, committees..... "Respice, adspice, prospice. Macte virtute!"

The SRS continues to grow in numbers both nationally and internationally. Its members have always donated their time and effort to promote the optimal care of those individuals with spinal deformities through the SRS committee structure. The committees have been responsible for the creation of the SRS Web site, SRS Instrument Manual, annual data collection and distribution of the M & M report, multiple meta-analysis regarding deformities, financial, educational and world outreach programs. The committees are the energy sink of the society. The board of directors formulate the ideology of the society; the committees must "make it happen". There are presently over 40 committees serving the SRS. Although each committee has a unique mission, their domains often overlap. This results in redundancy and inefficiency of the committee structure.

The committee chairs recently met in Dallas in an open forum to define their committee's roles. Based on the newly established goals of the SRS, as defined in the summer retreat of 2005, the committee chairs were asked what specific goals came under the purview of that committee. The discussions were led by an assigned member of the board and focused on strategies that would allow the most efficient use of committee time and effort to achieve the SRS goals. The chairs discussed among themselves what role their committee would have in completion of a specific task. Matters of common interest between and among committees were identified. At the conclusion of the meeting, each committee agreed upon their specific tasks and strategies.

The Society will always rely on the committee structure to ensure its defined mission. With the increasing demands and challenges on the society, including controversies in government support of bracing programs, the need for deformity treatment, continued education of our members, ethical partnership with industry, coding and AMA issues, a strong and efficient committee structure is needed for our society to maintain its leadership role.

Respectfully submitted by,  
Thomas Maher, MD  
Secretary

# Copes Charged with Fraud

Arthur Copes, owner of the Scoliosis Treatment Advanced Recovery System (STARS), in Baton Rouge, Louisiana has been charged with 117 counts of insurance fraud, according to recent newspaper articles. Many SRS members in the US have fielded questions about the STARS from patients who found Copes' website. The website claimed that his STARS – a complex combination of bracing, chiropractic treatment, nutrition and exercise – would successfully treat scoliosis, eliminating the need for "painful and sometimes dangerous" surgery.

According to an article in the "Insurance Journal", Special Agents for the Louisiana Attorney General allege that Copes, who is not a licensed chiropractor, treated patients and sent bills to insurance companies for treatment by a licensed chiropractor. They further allege that he used names and signatures of licensed chiropractors, without their knowledge, to bill for treatments he performed. They estimate that insurance companies were fraudulently billed over \$138,000.

Copes faces a possible sentence of five years and/or a \$5,000 fine per count on the insurance fraud charges. Fines and/or prison sentences could also be imposed for practicing medicine without a license. His clinic has been closed, although there are others, including some of his protégés, still advertising similar treatment systems on the internet.

# Treasurer's Report

Richard E. McCarthy, M.D., Treasurer

The stability of the SRS is reflected in its treasures. The time and talent of the Board has been invested wisely in the long term planning for the future. They met in Seattle, discussed and planned the long-term goals that will be incorporated into the workings and budgets for the next few years.

The primary efforts of teaching and research were realized through a successful annual meeting in Miami. In spite of the hurricane a profitable meeting was realized allowing the Society to fund the many projects of the committees. This includes the Regional Courses held in Korea last August, Turkey in May, and the course in conjunction with the South African meeting this spring.

Research grants have been funded through the OREF revenue combined with profits from IMAST to the amount of \$250,000 for this year. We anticipate giving out \$290,000 in 2006 after having dispersed \$364,190 in 2005 for research grants.

IMAST conferences have traditionally been profitable and this year's meeting in Banff was no exception. The beautiful setting and industry support made for a very successful venue. We hope to continue this tradition with the help of the Broadwater meeting organizers.

The members of this Society can feel secure in the knowledge that the SRS funds are carefully budgeted and annually audited, reserves are well invested but fluid, and great diligence is directed towards spending our resources wisely to meet our mandate for teaching and research.

Total Assets 12/2005 ————— \$4,611,843.83

## Future Meetings

**European and Middle East Meeting**  
Istanbul, Turkey - May 25 - 27, 2006

**South African Course**  
Somerset West - May 31 - June 1, 2006

**SRS/AAOS One Day Course (2 locations)**  
New York City, New York, USA - June 9 - 10, 2006  
Costa Mesa, California, USA - June 9-10, 2006

**13<sup>th</sup> Annual IMAST**  
Athens, Greece - July 12 - 15, 2006

**SRS 41<sup>st</sup> Annual Meeting and Course**  
Monterey, California, USA - September 13 - 16, 2006

**14<sup>th</sup> Annual IMAST**  
Paradise Island, Bahamas - July 11 - 14, 2007

**SRS 42<sup>nd</sup> Annual Meeting and Course**  
Edinburgh, Scotland - September 4 - 8, 2007

# OREF and SRS Partnership Leads to Endowment Growth

For the past several years SRS leadership has worked with the Orthopaedic Research and Education Foundation (OREF) to establish an endowment fund to support SRS research and education. The goal is \$10 million, and to date the combined efforts of SRS and OREF have led to cash and planned gift commitments totaling about \$7 million. This is especially important as other sources of research support – such as academic institutions and federal agencies – cut back. By working with OREF, SRS has taken advantage of OREF's fifty plus years of fund raising efforts and their work in encouraging young researchers. Since 1955, OREF has provided more than \$6.6million to support spinal research for 125 projects, with the first of those spine grants in 1957.

In this campaign, donors make contributions to OREF for the benefit of the SRS endowment fund. That money is set aside specifically for SRS, and forms the principal of the SRS account. It is invested together with all of the other OREF endowment funds, now in excess of \$20 million. OREF endowment funds have consistently beaten their relevant benchmark indices, and have had significantly smaller losses in bad financial years. They have been a solid investment for the SRS and the more than 30 other orthopaedic groups that have endowment funds with OREF. For SRS and these other groups OREF provides help in planning a fund raising campaign, seeking donations, accepting and acknowledging the gifts (including tax deduction receipts), investing the funds, managing those investments, preparing financial statements, and distributing checks for the group.

Income from that fund is available annually for use by SRS at a recommended rate of 5% of the average principal calculated over twelve training months. If the investment yields more than 5% in total return, OREF recommends that the excess be reinvested into the fund so that it can provide a cushion in lean years such as 2000-2002, when market returns were much less. The amount earned each year is used as for research and education projects as deemed appropriate by the SRS Board.

Donations can be made in any amount, but individual commitments that will total more than \$20,000 (or more than \$50,000 by means of insurance or an estate gift) will qualify the donor for the OREF Shands Circle. That group is the highest level of donor recognition within OREF, and includes more than 470 members, including many SRS members and officers. The current board has made a commitment for each member to join the Shands Circle. The SRS Board encourages all members to join the Shands Circle to add to the SRS endowment and to reach the \$10 million goal.

## SRS Endowment Fund Drive

The Board of Directors is asking for 100% participation from all members of the SRS. We need every member's support in order to provide continued funding for spinal deformity research projects. If you haven't already donated or pledged to the SRS Endowment Drive, please do so now. Donations should be sent to:

### **SRS Endowment Fund**

C/O OREF

6300 N. River Rd, Ste 700

Rosemont, IL 60018

You may contact Gene Wurth or Robin Mueller at OREF (1-847-698-9980) if you have questions or want more information on donation options.

To learn more about how to join the Shands Circle for the benefit of SRS please contact Gene Wurth at OREF at [wurth@oref.org](mailto:wurth@oref.org) or by phone at 847-384-4362. You can also contact Maureen Corcoran at [Corcoran@oref.org](mailto:Corcoran@oref.org) or by phone at 847 384-4360. The OREF website ([www.oref.org](http://www.oref.org)) provides information about joining the Shands Circle, and offers materials that explain the variety of ways that financial planning can help you accomplish some personal and charitable goals, including a gift calculator. Many members of SRS have taken advantage of financial planning tools such as life insurance policies to join the Shands Circle.

Every member of SRS has a vested interest in the success of this effort, since the research supported by these funds will advance the state of spinal care for all surgeons. With your participation the SRS Endowment Fund can reach its target of \$10 million. You can also help by encouraging others to join. If you know of others who might be interested - surgeons, patients, or their families - please contact me and we can develop a strategy to get them involved.

We have been pleased to work with SRS on this campaign for several years and look forward to its successful completion.

Gene R. Wurth  
President/ CEO, OREF

The Endowment Committee has been busy during the last six months. I am pleased to report that the SRS Endowment Fund has a current value of \$7,000,000 in cash and pledges. This is a significant increase in the fund over the last year. While the fund continues to grow, an all time high in monies were made available for research last year, with the Research Committee granting over \$300,000 in grants. Your donations are being invested in research that will directly benefit our patients, our practices and the SRS.

The Miami Challenge created by SRS President Randy Betz generated over \$40,000 in donations to the Endowment Fund. Thanks to those of you who stepped up to the challenge at the Annual Meeting. We continue to march toward our goal of \$10,000,000 by 2010.

Each member on the Board of Directors has made a commitment to be a member of the Shands Circle of the OREF. We hope that every SRS member will donate to the Endowment Fund and will consider joining the Shands Circle. If you have questions regarding the Shands Circle, please read the OREF article within this issue of the newsletter. Also, feel free to contact Gene Wurth at the OREF office. For those of you who are working on your financial planning and would like information on how to have the SRS Endowment Fund be a part of your strategy, please contact Gene. The OREF has planners who can help you with the process.

We are excited for the coming year. Thanks to all of you have participated in the Endowment Fund. We look forward to working with all of you who would like to participate in our research effort. The SRS is exceptionally unique in its level of commitment to supporting innovative clinical and basic research. Please help us to reach our goal of \$10,000,000 by 2010.

Howard A. King, MD  
Chair, Endowment Committee

# Coding, Billing, and Reimbursement Issues Regarding VEPTER

Accurate coding for spinal procedures is important in establishing a common understanding of what is performed at specific surgeries, documenting physician work associated with these activities, and in determining billing and reimbursement for these procedures. There is some doubt as to whether current CPT codes are clearly useful and accurate in describing the surgical procedures related to the use of the VEPTER system. Clearly, The VEPTER system represents new technology which was not even envisioned at the time the current codes were developed.

It would make sense, then, to survey the physicians who perform these procedures to ascertain 1) what CPT codes they report for these procedures, and 2) whether they are getting reimbursed fairly for these procedures. If it is determined by survey that the existing codes well-describe each procedure performed, they are applied relatively uniformly throughout the country, and physicians are being reimbursed fairly for their work, then really nothing further needs to be done. However, it is unlikely that all of these criteria are met.

Plans are being made to perform an informal survey of SRS members who perform the VEPTER procedures to determine which CPT codes are being used, whether they feel that the procedural terminology codes actually describe the work, and whether they are being fairly reimbursed. Many physicians are unaware of their rate of reimbursement for these procedures. As a result, it will require some homework to look at specific indi-

vidual cases to determine whether payment was received and whether it was reasonable.

There are several different procedures which are relevant to the VEPTER. These include 1) performing a thoracotomy to release rib fusions; 2) insertion of a distracting device, including rib to rib, spine to rib, and pelvis to rib constructs; 3) device revision, for instance when a device cuts out through bone or the device has already been maximally lengthened thereby requiring reinsertion; 4) in situ lengthening of a previously inserted device; and 5) device removal.

It will be useful for surgeons who use this technique to review which codes they are using for these different types of procedures, and to look at specific recent cases to ascertain the payment history for these codes. For those VEPTER surgeons who operate with a general surgeon, it will be necessary to know if the general surgeon uses separate codes or bills as co-surgeon.

It is likely that a survey will be circulated soon. Now is the time to look at codes and payment history. If it is found that the current codes are not suitable for these procedures, then there may be cause for the Coding Committee to proceed with development of new CPT codes for these procedures.

R. Dale Blasier, MD  
Chair, Coding Committee

The Global Outreach committee recently sent out a survey to determine the number of SRS members interested in participating in an outreach program. The committee would like to set up SRS outreach sites in various areas of the world and the results of this survey will help the committee determine where sites are most needed. These outreach sites will help the local physicians/surgeons learn techniques to help care for those with spinal deformities in their own country. There is a great need for these sites and volunteers. In many of these countries there may only be one or two surgeons who are trained to care for these patients. Please complete the survey located on the Global Outreach page on the SRS Web site and click on "Global Outreach Survey".

The committee is also working in conjunction with Health Volunteers Overseas to set up outreach sites. Health Volunteers Overseas promotes healthcare in underdeveloped nations through training and education. The Orthopaedic division serves 11 countries, including Nicaragua, Costa Rica and China. SRS and HVO are currently coordinating efforts to set up a spinal deformity site in Nicaragua.

There are currently three SRS affiliated sites, the Butterfly Foundation, FOCOS, and The Silver Service Foundation. The Butterfly Foundation's primary site is in the Dominican Republic although they have similar projects in Chile and bi-annually in Malawi. These missions are done on a quarterly basis. To date, over 100 children with severe spinal deformities have been seen and treated.

FOCOS has two sites, Ghana and Barbados. The Ghana mission is a bi-annual trip and the mission to Barbados is quarterly.

The FOCOS Clinic in Ghana opened in 2004 and has seen over 1000 spine cases including neuromuscular scoliosis, TB kyphosis, and idiopathic scoliosis. Over 150 patients have been surgically treated at both sites.

The Silver Service Foundation's site is in Cali, Columbia. This is also a bi-annual mission. The program has provided surgical care to over 60 patients and the team commonly sees patients with infantile scoliosis, congenital spinal abnormalities and other inherited conditions, such as Morquio syndrome and Escobar syndrome.

For the past two years, the Global Outreach Committee has offered an Educational Scholarship to assist spine surgeons from developing nations who need financial assistance in order to come to the Annual Meeting. Since the inception of this scholarship in 2004, we have awarded 56 scholarships to recipients from all over the world, including India, China, and Argentina. The scholarship is a financial endowment of up to \$2000 USD per applicant and is applied to travel expenses and registration fees. If you know of a surgeon who could benefit from this scholarship, please go to the Global Outreach page on the SRS Web site and click on "Educational Scholarship Fund". The application deadline is May 15. The committee would like to thank DePuy Spine, Medtronic Sofamor Danek, Stryker, and Synthes for their continued support of this program.

If you would like to submit an article to the SRS newsletter, please e-mail the article to [amiller@execinc.com](mailto:amiller@execinc.com) or [vkalen@email.arizona.com](mailto:vkalen@email.arizona.com).

**Vision Statement** The SRS will increase its recognition domestically and internationally as the leading source of information and knowledge on spinal disorders affecting all patients, regardless of age.

## Strategic Plan

- Goal 1. Funding:** The Scoliosis Research Society will have a funding base large and diversified enough to ensure financial independence in funding research and sound fiscal operating policies.
- Goal 2. Research:** The Scoliosis Research Society will be the global source of research on spinal deformities.
- Goal 3. Education:** The Scoliosis Research Society will be the global source of education on spinal deformities.
- Goal 4. Globalism:** Through its members and programs, the Scoliosis Research Society will improve spinal deformity care globally.
- Goal 5. Advocacy:** The Scoliosis Research Society will be recognized as the leading resource for information and public policy on spinal deformities.
- Goal 6. Society Leadership:** The Scoliosis Research Society will operate in a manner consistent with its stature as the pre-eminent spinal deformity society.

## 2005-2006 Board of Directors & Committee Chairs

### President

Behrooz A. Akbarnia, MD

### President-Elect

George H. Thompson, MD

### First Vice-President

Thomas G. Lowe, MD

### Secretary

Thomas R. Haheer, MD

### Treasurer

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### Past President

Randal R. Betz, MD

James W. Ogilvie, MD

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#### Fellowship

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#### Program

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#### Research Grant

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#### Growing Spine

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### Aging Spine

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### Adult Deformity

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### Web Site

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### 3D Spinal Classification

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### Database

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### Marketing & Public Relations

Alan Moskowitz, MD

### Patient Education

Linda P. D'Andrea, MD

### Spinal Cord Monitoring

James R. Malcolm, MD

### Local Affairs

Jeffrey D. Coe, MD

Jeffrey S. Kanel, MD

John E. Lonstein, MD

### FOSA Representatives

William C. Horton III, MD

James W. Roach, MD

### COSS Representatives

Courtney W. Brown, MD

David W. Polly, MD

### BOS Representatives (formerly COMSS)

Thomas R. Haheer, MD

David W. Polly, MD

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Tiffany Ann Jackson, Membership &

Meetings Manager

Amy Miller, Program Manager

Kevin Szpara, Administrative Assistant