

## History of the Western Orthopaedic Association

The written history of the Western Orthopaedic Association (WOA) was first recorded by Thomas Taber M.D. (President 1976) of Phoenix, Arizona. In Dr. Taber's notes from 1994, he abstracted information from two previous WOA Presidents – Steele Stewart M.D. (Honolulu: President 1934) and Merrill Mensor M.D. (San Francisco: President 1948). Drs. Steele and Mensor delivered an address on the past history at the WOA Annual Meetings held in 1967 and 1974, respectively.

The WOA was officially incorporated in 1932; however, orthopaedic surgeons in Los Angeles and San Francisco were meeting as early as 1922. The Los Angeles Orthopedic Club was organized in 1922, and in 1923 there was a joint meeting of orthopaedists from San Francisco and Los Angeles.

Some of the early names in the Los Angeles Orthopedic Club were: Charles Leroy Lowman (President 1936), Ellis W. Jones Sr., Halbert Chancel, Alfred Gallant (President 1947), Steele Stewart (President 1934), John Dunlap (President 1939) and John Wilson Sr. In San Francisco, the names included: Walter Baldwin, Howard Markel (President 1948), Leonard Ely, Arthur Fisher, James Watkins (first President of the WOA–1933), Thomas Stoddard, Edward Bull, Jack Haas, and James McChesney.

In the lecture given by Dr. Steele Stewart in 1967, he indicated that he and Howard Markel talked of the possibility of a Western Orthopaedic Association while they were on the SS Maui as it sailed toward the Golden Gate.

Concerning the early history of orthopaedic surgery, there were no organized training programs and, as such, preceptorships were common. Board certification did not occur until the formation of the American Board of Orthopaedic Surgery (ABOS) in 1933.

The Western Orthopaedic Association became the first orthopaedic society west of the Mississippi River. Other orthopaedic groups at that time were the American Orthopaedic Association (formed in 1888), the Clinical Orthopaedic Society (COS) which started as the Central States Orthopaedic Club in 1912 and then changed to COS in 1923, and the American Academy of Orthopaedic Surgeons (AAOS) founded in 1933.

In the formation of the WOA, the initial proposal in 1929 was between the clubs of Los Angeles and San Francisco to form an association and the constitutional committee was appointed consisting of Drs. Howard Markel, Thomas Stoddard, Charles Lowman and Steele Stewart. The constitution was ready by the Fall of 1930 and originally provided for 3 sections geographically: (1) Northern to include British Columbia, Washington, and Oregon, (2) Central to include Northern California, Nevada, and Utah, and (3) Southern to include Southern California, Arizona, New Mexico, and Hawaii. It was decided to hold the meetings in rotation (the early WOA annual meetings were rotated between San Francisco and Los Angeles and later included a meeting in Yosemite in 1951) and James Watkins of San Francisco became the President at the first meeting held in San Francisco in 1933. The initial efforts were for further membership and additional chapters. Seattle became the next chapter in 1937 and Roger Anderson was elected president. The chapters included Arizona (1945), Gulf Coast (1967), Hawaii (1952), Idaho (1953), Los Angeles (1932), Los Padres (1974), Montana (1954), Nevada (1987), New Mexico (1955), Northern California (1932), North Texas (1956), Orange County (1975), Oregon (1949), Panhandle HiPlanes (1956), Puget Sound (1937), Rocky Mountain (1953), Sacramento Valley (1969), San Diego (1952), Sequoia (1981), South Texas (1956), Spokane (1952–1986), Utah (1949), Western Slope (1990), and Wyoming (1980). Most chapters have evolved into state orthopaedic

organizations, however, some of the chapters remain active (examples are San Diego, Los Angeles, San Francisco, and Seattle). These chapters function as entities independent of the WOA.

The meeting sites continue as a rotation between California, Hawaii, and a venue in one of the other fourteen member states. The meeting format initially was that of a combination of a scientific program combined with social functions. This format has remained consistent to date.

Some highlights of the early presidential line include:

Dr. Watkins (President 1933) studied orthopaedic surgery in various European centers for three years working with Drs. Hoffa, Lange, and Lorenz. He married Eleanor Fairman Preston from Virginia who herself was a recent medical graduate. Dr. Watkins was the City Health Officer in San Francisco from 1907-1910.

The second president of the WOA (1934) was Steele Stewart M.D. from Honolulu. He was the Chief Surgeon at Shriners Hospital until 1946. He was involved in a controversy over fee scheduling for doctors on the island of Oahu. The state of California heard about this endeavor and became the first state to utilize a relative value scale. Hawaii followed thereafter.

Charles Lowman M.D. (fourth president – 1936) and was the founder of the Orthopaedic Hospital in Los Angeles. He was a recipient of the nation's highest civilian honor—the Presidential Medal of Freedom. He died at the Orthopaedic Hospital at the age of 97. At one time, he was the only orthopaedist between San Francisco and New Orleans. He published in the *Journal of Bone and Joint Surgery (JBJS)* in 1924 on “Rotary Subluxation of the Knee,” and in 1931 on “the Double Leaf Shelf Operation for Congenital Dislocation of the Hip.”

Warren White M.D. from Honolulu (Shriners Hospital) was President in 1955 and published a paper in *JBJS* 1953 (37-A)–“The Development of Orthopaedics in the Far West” featuring the WOA.

Although the Presidents of the WOA have come from essentially every member state, there is a significant contribution from the Hawaii Chapter. Presidents from Hawaii include Steele Stewart (1934), Warren White (1955), Ivar Larsen (1967), William Gullledge (1974), John Smith (1980), Donald Jones (1988), Thomas Grollman (1996), and Linda Rasmussen (2009).

In addition, there have been three female orthopaedists who have served as WOA President: Drs. Linda Rasmussen (Hawaii - 2009), Ellen Raney (Oregon - 2013), and Valerae Lewis (Texas - 2014).

The WOA was inactive from 1944 – 1946 due to World War II. In 1942, there were 89 members. Alfred E. Gallant was elected President in 1947 and the WOA resumed meeting with the 12th annual meeting held at the Biltmore Hotel in Los Angeles. This was the first meeting where a commercial exhibit was presented and reportedly with great success. This fact enhanced the treasury and the Organization achieved financial stability. The chapters and the membership steadily increased, and by 1960, there were 16 chapters in all 14 western states. In 1948, there were 198 members, and by 1958, there were 698 members. Guest speakers became part of the program in 1954. Junior members (under the age of 42) became part of the Board in 1971.

In 1955, the Organization was incorporated as a “not-for-profit organization” under the presidency of Warren White M.D. (Honolulu). The aim of the group included scientific, educational, and charitable purposes for the advancement of the art and science of orthopedic surgery.

In 1954, the Organization hired Vi Matheson as the full-time secretary and in 1956 the permanent central office was established with Ms. Matheson as the first Executive Secretary. Jacqueline Martin was hired as the assistant Executive Secretary in July 1972 and took over the full-time position in October 1972 when Vi Matheson retired due to illness. Jackie Martin continued as the Executive Secretary until her retirement in the late 1990s. She passed away in 2013. The central office remained in the San Francisco area until Jackie's retirement and then was moved to Napa, California until 2005.

In 1957, a proposal was approved to give the outgoing president a gift of a Presidential Medallion; a bronze paper weight was created and provided for all past presidents. This presentation continued until 1980 when the medallion was incorporated into the Presidential Plaque. The tradition of the presentation of a Presidential Medallion to the outgoing president was reestablished during the presidency of Dr. Ramon Jimenez in 2008.

In 1960, *JBJS* became the official journal of the WOA and for some years the meeting abstracts were incorporated into the Journal.

There are several WOA residency award programs, four of which are named. The selection for each is accompanied by a \$2,000 stipend. The named awards are:

**(1) Vernon Thompson Award**

The initial WOA resident orthopaedic surgery award was initiated through the efforts of Vernon P. Thompson M.D. He was keenly interested in the teaching and education of young physicians and felt residents and fellows should be recognized by allowing them time to present at the WOA annual meeting. He was elected WOA president in 1952 and his primary interest was that of establishing a competitive presentation by resident surgeons. Each year there are resident awards dedicated to Dr. Thompson's efforts on behalf of resident education.

Dr. Thompson received his premedical training at Stanford University where he developed an interest in orthopaedic surgery. In 1917, he spent a year at officers training in the U.S. Army in Georgia. He went to Harvard Medical School, graduating in 1923, and returned to Stanford for his internship. He maintained an interest in orthopaedic surgery and returned to Boston for training at the Massachusetts General Hospital and Children's Hospital. He commented that residents and attending surgeons' best papers are founded on the complete series of observations of actual patients followed over a period of years. These observations are due to the hard work and persistent effort of a critically minded resident who often can see things a little more objectively than the man who was already acquired his clinical impressions and has more or less subconsciously arrived at a prior conclusion. Dr. Thompson passed away in 1961.

**(2) The Lloyd Taylor Award**

Lloyd Taylor was President of the WOA in 1977. After he passed away, an award in his honor was established by Richard Welch M.D. (President 2001) who stated that Dr. Taylor's passion was resident education. In 1949, while at Walter Reed Army Medical Center, Dr. Taylor established a formal Armed Forces Orthopaedic Residency training program. He ended his military career as Chief of the training program at Letterman Army Hospital in San Francisco. Following his distinguished military career, Dr. Taylor was the Director of the San Francisco Orthopaedic Residency Training program.

**(3) The Sanford and Darlene Anzel Award**

The Sanford and Darlene Anzel Resident Award was established in memory of Dr. Sanford Anzel

(President 1989). Dr. Anzel completed his residency at the Mayo Clinic, and after serving in the USAF (1959-1964), he practiced in Orange County. He was one of the founders of the residency program in Orange County and the Clinical Professor of Orthopaedic Surgery at University of California, Irvine as well being the Chief of Orthopaedics at the VAMC in Long Beach, California. In addition, he served as Chief of Orthopaedic Surgery at the Orthopaedic Surgery at the Orange County Medical Center, St. Joseph's Hospital, Orange, CA, and was the Director and President of Clinical Research of the California Orthopaedic Research Institute. Dr. Anzel also served as President of the California Orthopaedic Association (1993-1994) and was a charter member of the America Association of Hip and Knee Surgeons (1991). He passed away February 15, 2008. His wife, Darlene Anzel, continues to attend the annual meeting to present the Anzel Award.

#### **(4) The Harold and Nancy Willingham Award**

The Harold and Nancy Willingham Award was established as an endowment fund for resident education. Dr. Willingham has been a member of the WOA since 1966. He served the WOA as Secretary from 1978-1981, Treasurer from 1983-1984, was on the Board of Directors from 1989-1991, and served as President in 1991. Dr. Willingham practiced in Tucson, Arizona and was one of the principals in the establishment of Tucson Orthopaedic Institute. His Presidential Address in 1991 was on "Malpractice—what is it, where did it come from, where is at now, where is it going and, finally, what should be done about it." Harold and Nancy Willingham continue to attend the annual meeting to present the Willingham Award.

The unnamed resident award papers are accompanied by a stipend.

**Young Investigator Awards (3):** these are selected by the program committee and presented at each meeting and each is accompanied by a \$1000.00 stipend.

**Poster Awards:** Three posters are selected at each meeting and are awarded a stipend of \$700, \$500, and \$300 for first, second, and third selections, respectively.

As part of the resident education program, the WOA has a Resident Liaison position and Jennifer Van Warmerdam M.D. (San Francisco) is the current chair.

At each annual meeting, the Howard H. Steel Lecture is given as a non-orthopaedic topic of interest (usually in the art or sciences) to the membership. This is a \$100,000 endowment to the WOA from Dr. Steel, who also was one of the founders of the Eastern Orthopaedic Association. Dr. Steel has a reputation as an excellent clinician, teacher, and researcher, particularly in the area of pediatric orthopaedics. The Steel Lecture is one of the most well attended events at the annual meeting.

In 2016, the WOA Board established the Blair Filler M.D. Lifetime Achievement Award in honor of Dr. Filler who has served the WOA in many capacities, including President in 2004. He is credited with re-organizing the governance, leadership, and oversight of the WOA during his presidency. The Blair Filler Award was established as an annual award to honor those special individuals, who throughout their career, have demonstrated and promoted the highest values of the WOA. Dr. Filler will be the first awardee at the 2016 meeting in Indian Wells, CA.

In 1989 Rodney Beals M.D. (President 1981) initiated the Travelling Professor program which was well received by the chapters and membership. The program continued through 2002. The awardees included David Hamblen Ph.D., F.R.C.S. – Glasgow, Scotland ('89); Thomas Taylor, F.R.C.S. – Sydney, Australia ('90); Professor Rene Marti, Amsterdam, The Netherlands ('91); Ian Learmouth F.R.C.S. – Capetown, South Africa ('92); Christian Gerber M.D. – Fribourg,

Switzerland ('93); Ian Kelly, F.R.C.S. – Glasgow, Scotland ('94); Ross Nicholson F.R.C.S. – Auckland, New Zealand ('95); John Leong M.D. – Hong Kong ('96); Anthony Pohl M.D. – Adelaide, Australia ('97); Lars Engebretsen M.D. – Oslo, Norway ('98); Donald Howie M.B.B.S. – Adelaide, Australia ('99); Lennart Hovelius – Gavle, Sweden ('2000); Klaus Parsch – Stuttgart, Germany (2002).

The Organization has developed a self-assessment exam (SAE) program which offers 10 credit hours at each WOA annual meeting. This is beneficial to the membership concerning Maintenance of Certification with the ABOS and grew out of a meeting organized by Bill McMaster MD, with Shep Horowitz of the ABOS, and Chuck Freitag of Data Trace. The financing of this concept was linked to Ortho-Preferred liability insurance (a division of Data Trace) and facilitated by David Reicher (President of Data Trace). The relationship with Ortho-Preferred is a major benefit to the Regionals (WOA, EOA & SOA) as those who choose Ortho-Preferred will also become members of their respective Regional organization. The 2016 WOA SAE Chair is Omer Ilahi M.D.

The WOA led the discussion concerning the concept of the Regional organizations having a seat on the AAOS Board of Councilors (BOC). Bill McMaster M.D. from the WOA advanced the concept that the Regionals would bring unique issues to the national organization. He led the negotiations and the Regionals were provisionally accepted on the BOC in 2009. The first WOA representative was Robert Slater M.D., who did a superior job including being selected to serve on the BOC Executive Committee during his tenure. Bryan Moon M.D. is our current AAOS/BOC representative.

Following Robert Eilert's Presidency, the WOA added the ex-officio position of Managing Director. The Managing Director serves in an advisory capacity to the Board and provides continuity to the Organization as the Board transitions each year. The Managing Director serves for 3 years and can be nominated for a second 3-year term. Dr. Eilert served as Managing Director from 2004-2010 followed by Lawrence Housman from 2010-2016.

The current Board of Directors include President John Tongue M.D., first Vice President Robert Slater M.D., Second Vice President Bryan Jewett M.D., Secretary Basil Besh M.D., Past President Paul Collins M.D., Treasurer Nitin Bhatia M.D.; Members at Large: Jay Lieberman M.D., Milton "Chip" Routt M.D., and Patrick Halpin M.D.; Junior Board Members: Jonathan Bravman M.D., David Chafey M.D., Jeffrey Krygier M.D., and James Van den Bogaerde M.D.; AAOS Board of Councilors Representative Bryan Moon M.D.; Managing Director Lawrence Housman M.D.; and Lay Member William Best. The lay member board position is being added as of the 2016 meeting. The 2016 Program Chair is Robert Hart M.D.

The current membership (December, 2015) is 1,128 members (5 categories: Active, Senior Active, Allied Health, Military, and Honorary). Cynthia Kelly M.D. is the 2016 Membership Chair. The annual meeting CME credits are 28.75 hours

Since 2003, WOA has contracted with Data Trace Management Services to provide the financial and logistical expertise to the organization. The Executive Director, Chuck Freitag, and Director of Operations, Cynthia Lichtefeld, have served in these capacities since the inception of this partnership. Stacy Wald, Herb Fried, David Reicher and Audrey McDonough round out the Data Trace senior management team who interface with the WOA. Blair Filler (President 2004) and Robert Eilert (President 2002) were instrumental in managing the transition to Data Trace which allowed the WOA to regain, and then maintain, a firm financial state.

The organization has an Allied Health program with an outreach to orthopaedic physician assistants, nurse practitioners, and other related providers, including a specific program at the annual meeting focused on their educational needs. The current chair is Jason Salden P.A.

In 2016, the WOA voted to form a 501C (3) foundation (Western Orthopaedic Foundation). This is a tax exempt foundation allowing contributions to further the mission of improving orthopaedic education. The WOA parent remains a 501C (6) organization.

As the organization prepares for the 80th Annual Meeting in Indian Wells, California, the WOA continues to be the premier regional organization involved in resident, fellow, and faculty participation furthering the art and science of orthopaedic surgery. The meetings are able to maintain the balance between the scientific and social formats and continue to be beneficial to all concerned.

Larry Housman M.D., Managing Director – WOA: September 2016