



# The Quail Runner

Quail Run  
Condominium Trust

Volume 6, No. 2  
June, 2008

The Quail Runner, our condominium's newsletter, is published four times a year in March, June, September, and December to bring you information Unit Owners need to know. The Trustees would appreciate your comments and suggestions about how to improve The Quail Runner. Please send in your ideas and material for publication. See contact information on Page 10.

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## INTRODUCING OUR NEW PROPERTY MANAGER

**D**ave Mussen is new to us and new to American Properties Team, but he is not new to property management. Many years ago a friend and golf buddy started in the management business and asked Dave to come and work for him. Dave has been in property management ever since.

After working for his friend for years, the friend retired and sold the business. When the new owners decided to close the management branch, Dave left and came to work for APT last November. With Jim Boyle's retiring, Dave was assigned to take over the management of Quail Run. For the past month, the two of them have worked together to ensure a smooth transition.

He hails from a small town on the Ausable River in upstate New York called Keeseville, 13 miles south of Plattsburgh. Keeseville sits four miles from Lake Champlain and only two miles from the spectacular geologic formation called Ausable Chasm, also known as "The Grand Canyon of the East." He recalls as a kid washing windshields for pocket change in the parking lot of the popular attraction.

He was an avid bowler for many years in the 1960's and 1970's,

winning several tournaments. He still bowls in a championship league, but in recent years he has concentrated on golf. He plays year round and sports a 6 handicap.

He has two children in their early 20's and lives in Beverly on the North Shore.

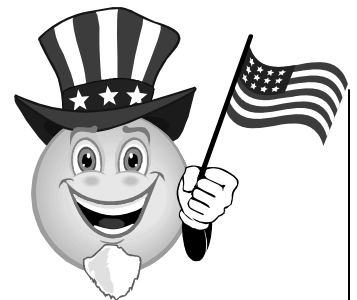
We welcome Dave and look forward to working with him.



## FROM THE DESK OF THE PROPERTY MANAGER

**A**llow me to introduce myself – Dave Mussen, your new manager. I have been at American Properties Team for nearly a year now, after managing communities at another company for over 19 years. I've been work-

(Turn to DAVE on page 2)





*(DAVE continued from page 1)*

ing with Jim Boyle to transition into your community for the past month. Jim is "officially" retiring on June 26<sup>th</sup>, and we wish him well!

Quail Run is a beautiful property with a wonderful, hard working Board and friendly homeowners. I'm looking forward to working with you all. As a reminder, Kathy Asmar is still the first contact for all homeowner requests. Kathy can be reached at 781-932-9229 ext. 222 during the hours of 7:30 am to 4 pm, or by email at [kasmar@apftin.com](mailto:kasmar@apftin.com). Please continue to route all requests through her, including those for Rich. Kathy helps Rich prioritize his work, stay on schedule, and makes sure everything is documented and followed up on. The Board meetings remain usually on the first Wednesday of each month at 5:00 p.m. If you have a specific request to bring before the Board, please let me know through Kathy, and I will make sure that it is placed on the agenda.

Here's to the start of a wonderful summer!

***Ausable Chasm is an ideal vacation or week-end destination that is only a few hours drive away with lots to do and see.***  
***For more information, go to their website:***  
***[www.ausablechasm.com](http://www.ausablechasm.com)***

**FRIENDS OF CUMMINGS PARK ON CITY'S WIN IN COURT DECISION**

*[From an email sent by Steve Keleti]*

**T**he Massachusetts Supreme Judicial Court found in favor of the City of Woburn June 10th, regarding the proposed development of 75 acres of Northeastern University's campus by Archstone-Smith Apartments. The Friends of Mary Cummings Park wish to congratulate the City of Woburn on its successful appeal, which will limit Archstone-Smith's proposed Chapter 40B development on Cambridge Street to a maximum of 300 units. The Friends of Mary Cummings Park submitted an amicus to the Court on this case, supporting Woburn's position.

This is a great success in our efforts to protect Mary Cummings Park from being irreparably damaged by an ill-conceived development on land that is a state-designated Priority Habitat for Rare Species and has also been enjoyed by the public for recreational use for many generations.

The Court's decision overturns the Superior Court ruling which would have allowed 540 units on the land and affirms under Chapter 40B that the Housing Appeals Committee must uphold the locally-imposed conditions unless the developer can show that the conditions make the project uneconomic. So, all 50 conditions imposed by the City of Woburn's Board of Appeals have now been upheld. This was also the main argument presented in the amicus submitted by the Friends of Mary Cummings Park to the Supreme Judicial Court.

The land, composed of a farmhouse and greenhouses on Cambridge Street and over 70 acres of forest and wetlands, was used as part of Northeastern University's Suburban Campus as a "Botanical Research Station." The Friends remain concerned that much of this land is a state-designated Priority Habitat for Rare Species and contains two state-certified vernal pools which would still be negatively impacted by what is still a very large scale and spread out development.

The 75 acres of Northeastern University land also cut very deeply into the 210 acres of Mary Cummings Park and the development as proposed would have an adverse impact on the enjoyment of the park.

We hope to continue to work with the Woburn Conservation Commission and the Massachusetts Department of Environmental protection to make sure that any development on the Northeastern University land will not adversely impact this protected habitat, the quality of the local water supply, and the enjoyment of the surrounding park.

We thank everyone who has helped in this case and are continuing to help in preserving Mary Cummings Park.

Please encourage others to join the Friends of Mary Cummings Park, so that we can build on this success."

Steven Keleti, President



## COURT UPHOLDS CITY IN ARCHSTONE CASE

[Condensed from the Woburn Advocate Jun 10, 2008]

**M**ayor Thomas L. McLaughlin announced Tuesday that Woburn has won its longstanding legal challenge to Archstone-Smith's proposed 640-unit housing development.

The controversy dates back to September 2000, when Archstone, a Colorado-based real estate company specializing in metro-area apartments, submitted a plan to the Board of Appeals for 640 units to be built off Cambridge Road on property owned by Northeastern University. Part of the development would have fallen under the state's Chapter 40B laws, which mandates all communities must have a 10 percent affordable housing quotient, and mix market-rate apartments with the affordable units.

After almost a year of public hearings, the controversial project was approved by the Woburn Zoning Board of Appeals with about 50 conditions, including reducing the development to 300 units.

That didn't sit well with Archstone, which then appealed the decision to Housing Appeals Committee, Superior Court and finally the Supreme Judicial Court.

McLaughlin said he received a telephone call Tuesday morning from the city's attorney, Gary Brackett, who said the Supreme Judicial Court had upheld the Zoning Board of Appeals' decisions, including the 50 conditions to be met before construction could begin.

"Archstone has exhausted its appeals and will now have to comply with the court's decision," the mayor said. "This now leaves a question as to how Archstone intends to proceed in their purchase and sale agreement with Northeastern University."

McLaughlin said Tuesday afternoon he had not yet had a chance to read the entire court decision but added, "It looks to be a real home run for Woburn... It certainly will be a relief to the residents who travel through there."

McLaughlin was a city councilor in Ward 7,

where the development was proposed, "so the case is near and dear to me," he said. "I met face to face with the people who would be impacted by the development so I'm very happy for them."

The mayor expressed thanks to the law firm of Brackett and Lucas for their handling of the case "and to all the city officials, past and present, who stayed the steady course, provided the funding and necessary support to insure that the interests of the citizens of the city of Woburn were protected."

He said he also wanted to thank the city's taxpayers "who ultimately provide the tax revenues that allowed us to wage such a complex legal challenge. This case will now set legal precedent throughout the Commonwealth and the Woburn case will now be cited by other communities facing similar Chapter 40B challenges."

The city has spent well over \$350,000 in legal fees on the matter.

.....  
**A WORD FROM ALDERMAN DRAPEAU**

**T**he budget season is in full swing and it looks like the city will have a budget about \$4 million more than last year. Most of the increase is being driven by health care issues and settlements with unions which negotiated new contracts. I believe the new tax rate set this fall will cost an average of \$120-\$160 per household. The council still has some work to do on the budget and this number is just an estimate. Woburn is still far below the Prop 2½ limit by about a million dollars. Woburn is on firm financial ground, but we can do a better job managing our budgets.

Raymond Drapeau, Alderman, Ward 7

.....  
**QUAIL RUN COOPERATES WITH FRIENDS OF MARY CUMMINGS PARK**

**Q**uail Run completed installation of signs to Mary Cummings Park. We hope to have a ribbon-cutting once the Woburn DPW approves installation of the last sign at Sylvanus

(See COOPERATION on next page)



(COOPERATION continued from previous page)

Wood Lane.

The Friends of Mary Cummings Park have cleaned up and leveled various trails damaged by ATV use, and have begun installation of trail markers.

Many things are coming to a head, with the SJC decision expected any day now. Also, the Thorstensen property, 13.5-acres next to the park on Muller Road, should go to market in August. Other than the Northeastern/Archstone land, this is the last land abutting Mary Cummings Park which is still able to be developed. The Friends of Mary Cummings Park are helping coordinate creation of an limited liability corporation (LLC) to buy and hold the land; the LLC would give time to pursue grants and raise money to conserve the majority of the property as a buffer zone for the wetlands. The 2008 assessed valuation for the land is \$962,000. We still need conservation investors for \$800,000 in order to be able to make an offer on the land. Interested parties can contact Steven Keleti at [stevenkeleti@cummings-park.org](mailto:stevenkeleti@cummings-park.org).

The Friends of Mary Cummings Park needs as many people as possible to join, and urges all residents of Quail Run to join. The Friends currently have over 450 members, but would like to double this number by the end of the summer. They need this level of membership to ensure success in working with the City of Woburn and the Town of Burlington.

Steve Keleti, President  
Friends of Mary Cummings Park, inc.

### FRIENDS OF CUMMINGS PARK PICNIC

The Friends are having a picnic at the old camp site on Saturday, July 12<sup>th</sup> from 2:00 to 5:00pm. This is an opportunity for us to get together, meet other Friends of Mary Cummings Park, celebrate and discuss our accomplishments and look ahead to the rest of the summer and fall.

To get to the camp site either:

Enter at the trail at the blue water tower on Blanchard Road, and follow the trail directly to the camp site. This way can be muddy in a few places if it has rained recently.

Enter at the trail which has the message board kiosk on Blanchard Road, go to the trail at the southeast corner of the Flyers Field, and take a right at the first trail intersection (marked with a 4x4 post).

For the trail map of the park, go to this website: <http://cummingspark.org/maps/ptrailmap.html>.

We are sorry.  
In the march, 2008 issue of  
*The Quail Runner*,  
We mis-identified the new owners of  
A Johnson's Grant.  
They are  
Nicole and Jan Hermann

#### Kudos to the team

- Joel alpert
- Dick Clarke
- Rich defilippo
- Peter Kelleher
- Vinnie Murphy

For their efforts in researching, composing, mapmaking, locating, and installing the signs on our property directing walkers to the park

#### **New Unit Owner**

**Mary Orr Valega**  
**1 Douglass Green**



**To Our Community**



## LANDSCAPING AT QUAIL RUN 2008

This year, as in the past, all of the pruning for the reduction of long branches and dead wood on all large shade trees overhanging roofs as well as the pruning of all ornamental trees by 15-20% to minimize crowding was performed last winter. It is a lot less costly to do this work as late as possible in the season. Remember the Landscaping Committee schedules its work one year ahead.

Additionally, the following trees or large branches were taken down due to their proximity to units or to separate them from other plantings.

**At Johnson's Grant #9** Four (4) white pines, also between buildings 1 and 2, and two (2) pine trees removed and stumps ground below grade.

**At Michael's Green** At the entrance, two (2) crabapples and a maple were removed. **At #5**, a dead pine at the side of the unit was taken down and a large oak overhanging the garage in front of **unit #15** was removed.

**At Douglass Green #13** A large 12 inch branch overhanging the unit was removed.

**At Saw Mill Brook Way #13** A large 8 inch lateral leader was removed to reduce the risk of failure. **At unit #4**, a competing maple in front of the unit was removed. **At unit #15**, a black cherry was removed from the rear of the unit.

**At Kendall's Mill #18**, a rotted, decayed cherry was removed.

In cases where the trees were near a walking area or visible from the street, the stumps were ground below grade.

Foundation replacement plantings are on order and should be here within a few weeks. Remember, these plants are only guaranteed if watered, and that is the responsibility of the unit owners.

The planning for next year has started. The Trustees have requested additional control of the cost of landscaping at Quail Run. Bartlett and the Landscaping Committee will be looking over all clusters for areas that require work for next year. The Landscaping Committee will review any concerns of unit owners, but final decisions regarding landscaping will be made by the

committee.

The Landscaping Committed has suffered a large loss of personnel during the last year. The committee has now only four members to cover the six clusters. We urge anyone who has an interest in volunteering their time at Quail Run, to please call either Arthur Downing at 781-933-6241 or Eileen Lynch at 781-938-5355. We have always tried to have all clusters represented on the Landscaping Committee. In particular people in the Kendall's Mill, Michael's Green and Vine Brook Way clusters are needed to help on the committee.

Thank you all Unit Owners.

Arthur Downing

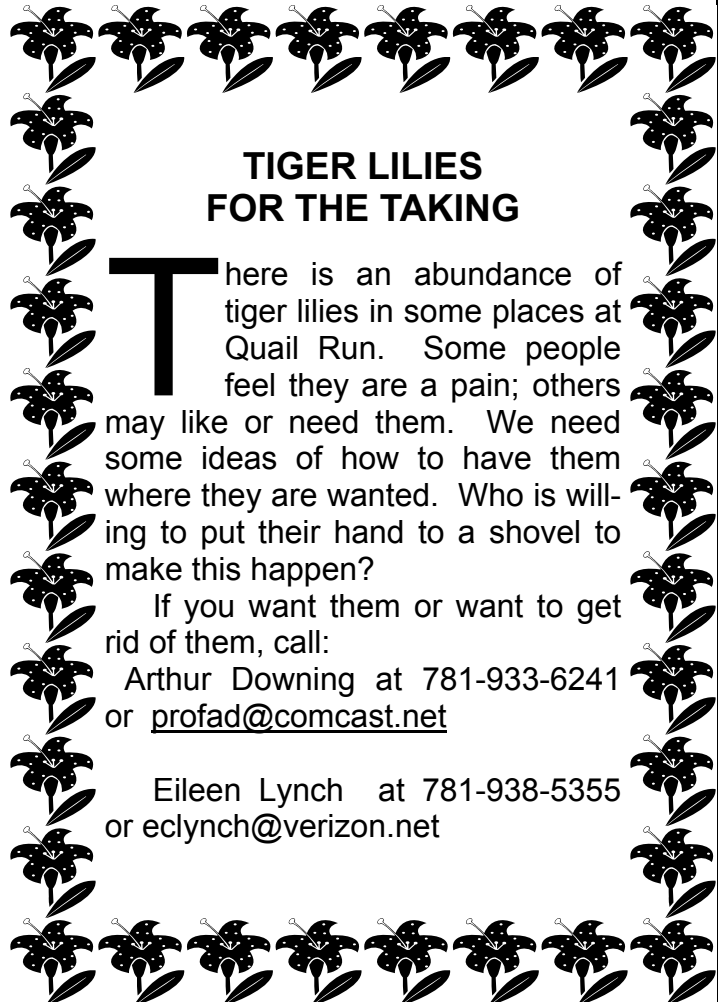
Members of the Landscaping Committee

Arthur Downing Co-Chair

Eileen Lynch Co-Chair

Harry MacDonald

Pinky Samoiloff



## TIGER LILIES FOR THE TAKING

There is an abundance of tiger lilies in some places at Quail Run. Some people feel they are a pain; others may like or need them. We need some ideas of how to have them where they are wanted. Who is willing to put their hand to a shovel to make this happen?

If you want them or want to get rid of them, call:

Arthur Downing at 781-933-6241  
or [profad@comcast.net](mailto:profad@comcast.net)

Eileen Lynch at 781-938-5355  
or [eclynch@verizon.net](mailto:eclynch@verizon.net)



[One of the problems affecting many of our trees is called root collaring. The Landscaping Committee and Trustees have become aware over the past several years that root collar disorders must be addressed. Next year the landscaping company and the arborist we hire will be instituting measures to eliminate improper mulching techniques, the cause of much of the problem, to inspect all of our trees for the disorders, and to remediate any problems found. To help you understand the root of the difficulties (pun intended), we present this article.]

BLISS by Harry Bliss



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you understand the root of the difficulties (pun intended), we present this article.]

### ROOT COLLAR DISORDERS

By E. Thomas Smiley, Ph. D.  
Plant Pathologist

A tree's root collar is the area where the roots join the main stem or trunk. This area is typified by a flare leading to the major roots (Figure 1). The root collar is part of the tree's trunk. Unlike roots, the trunk is not specialized to resist constant soil moisture. The movement of oxygen and carbon dioxide in and out of the phloem (inner bark) is inhibited by this water. Over a period of years the lack of gas exchange will kill phloem cells. This interferes with the downward movement of food

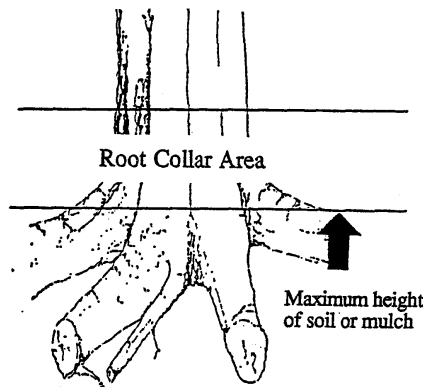


Figure 1. Typical root collar

(photosynthate) to the roots, eventually leading to root dieback and reduced water uptake.

Root collars with declining phloem are more susceptible to infection and disease caused by certain fungi.

Often root collars are buried during landscaping projects when fill soil is distributed around the tree. When trees are transplanted, they may settle in the planting hole or be set too deeply. Some trees arrive from the nursery with excess soil against the root collar.

Excessive mulch may also lead to death of the root collar. Mulch layers should not exceed four inches in thickness and should never be placed against the root collar.

### SYMPTOMS

Symptoms of root collar disorders are often first evident as foliage yellowing, early leaf coloration and drop, and dieback in the upper crown. Some trees will show no symptoms at all prior to their death during a hot dry period of the summer. Secondary invaders such as canker fungi and insect borers often invade trees stressed by root collar problems. These cankers may cause sunken areas near the soil line.

Since a disruption of translocation has occurred, some of the growth regulators responsible for hardening off in preparation for winter may not have reached the above-ground portion of the tree. Dieback due to winter injury thus may also be a symptom of a root collar problem, which becomes apparent in the spring.

Most tree and shrub species can develop problems from root collar burial. Very sensitive plants include sugar maple, California live oak, dogwood; Japanese black pine and Eastern white pine.

### DIAGNOSIS

The easiest way to check a tree for a root collar disorder is to look for natural root flare. If flare is present, the problem is most likely elsewhere. If no root flare is present, an excavation should be made or the soil should be probed with a stiff wire to locate the buttress roots. This should be done within two to four inches of the

(See COLLAR on next page)



*(COLLAR continued from page 6)*

trunk. Care should be taken not to damage the bark.

To determine if the soil or mulch against the collar has started to cause problems, a small amount of bark and sapwood from the trunk just above the roots is removed. If the inner bark is reddish brown and moist, and the sapwood is creamy white, the phloem dieback is due to abiotic (noninfectious) factors.

#### TREATMENT

If a tree is severely declining from a root collar disorder, removal is recommended before it becomes hazardous.

If decline symptoms are detected early, remedial actions can be taken which may save the tree. First, all soil or mulch in contact with the root collar must be removed. Root collar excavations can be done by carefully using small digging tools and a brush.

An alternative for excavating a large number of trees is a compressed air device or high-pressure water. Whichever method is used, great care must be used next to the tree to avoid more injury.

Soil should be removed from an area as large as possible around the trunk. A radius of six inches is the minimum excavation, which should be done. It is best if the slope angle of the excavated area is not more than 20°. Excavations should not injure roots over 1/4" in diameter. Adventitious roots over 1/4" should not be removed from the trunk since they may be providing substantial amounts of water and nutrients to the tree.

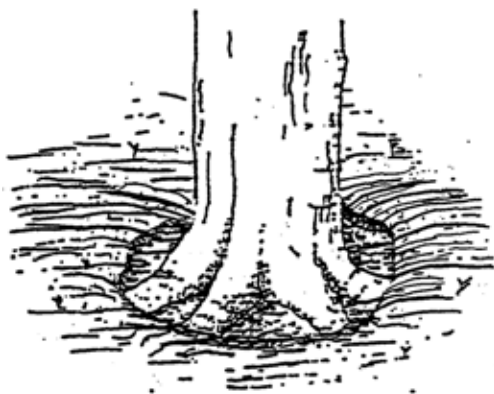


Figure 2. Excavated root collar.

The well which is created by this excavation may either slope to the original grade (Figure 2) or be lined with treated wood, brick

or stone. A layer of mulch up to four inches thick is appropriate on top of the soil, but not against the bark.

The second action to be taken is fertilization. Recommendations should be based on soil analysis.

The third action is to provide appropriate irrigation during dry periods. Most tree species require one inch of water per week during the growing season. Care should be taken not to over water. Irrigation water should never be applied directly to the trunk or root collar area.

In summary, trees and shrubs with buried root collars may decline and are more susceptible to attack by secondary pests. It is best to treat the situation as soon as it is discovered by means of a root collar excavation. Other actions such as fertilizing and mulching will promote tree health, thus improving chances for recovery.

Our deep thanks to Jackie Katzenstein for her donation of a computer for the garage office and to Dick Clarke for his donation of a printer to go with the computer.

#### Reminder

**Unit Owners may not park in guest spaces (except for purposes of facilitating snow removal).**

#### WHEELCHAIR RAMP BEING CONSTRUCTED AT MAIL KIOSK

The blue tent jutting out from the side of the mail kiosk is protecting the concrete that has been poured for a wheelchair ramp while it cures. It will be ready for use after a safety railing is installed.

A new edition of the Unit Owners' Handbook is coming soon! Look for it.



### SHUTTERBUGS WANTED

**A**re you handy with a camera? Have you been meaning to check out the beautiful Mary Cummings Park next door, but keep putting it off? Or have you checked out the park already with or without your camera? If that describes you, the Friends of Mary Cummings Park want you enter their First Annual Photo Contest. The contest is open to everyone and runs until 24 August. Winners will be announced on the website at [www.cummingspark.org](http://www.cummingspark.org) and will receive \$25 gift certificates from Ritz Camera in the Burlington Mall.

The contest is for amateur and professional photographers. You can enter the Amateur Youth category if you are 18 or younger or compete in the Amateur Adult or Professional categories. To enter, email up to three digital photos to [laurel@verizon.net](mailto:laurel@verizon.net), or if you prefer, submit matted 8 x 10 photos to the Francouer Law Office, 13 Freedom Road, Woburn, MA 01801. See the full contest details at [www.cummingspark.org/activities/photocontest2008](http://www.cummingspark.org/activities/photocontest2008)

Photos may show anything in the Park, whether it is people having fun or pictures of wildlife or the beautiful settings. Whether you take photography seriously or not, have some fun with your camera, and show us what you find of value in the park. Everybody sees something different in a place like this and there is so much to see along its trails, fields, and vistas. Share what you see, too.

The real purpose of the contest is to help defeat attempts to sell off the park for development. To do this, we want to introduce more people to the Park, show that the Park is used by many people, and show that it is full of natural resources worth preserving.

...Walter Howe.....

### ENJOY LOCAL MUSEUMS

Do you have a Woburn Public Library card? If you don't, here is a reason to get one.

Did you know that you can reserve museum passes for Children's Museum, Museum of Fine

England (Franklin Park Zoo and Stone Zoo) through the Woburn Public Library. Any Woburn resident with a valid Minuteman Library Network card may reserve Museum Passes. There is a limit of one pass per day per family.

Museum Passes may be reserved in person at the main Circulation Desk or by telephone (781-933-0148). You will need your Library card to place the reservation. Reserve more than one pass at a time for different museums on different days, or reserve more than one date at a time for the same museum, although the Library may place limits, especially during school vacations. Woburn Public Library would appreciate a call if you need to cancel your reservation.

To pick up your Museum Pass, you will need to bring your valid Minuteman Library Network card or your license with a Woburn address to the main Circulation Desk at the Library.

Passes are stamped with the date of use and are good only for general admission on that date. Passes do not need to be returned to the Library EXCEPT for the Zoo New England Pass.

**Children's Museum** – Phone 617-426-8855 or see website [www.bostonkids.org](http://www.bostonkids.org) for hours. Pass admits 4 people at \$2.00 per person.

**Museum of Fine Arts** – Phone 617-267-9300 or see website [www.mfa.org](http://www.mfa.org) for hours. Pass admits 2 people at \$5.00 per person. Current and upcoming exhibits include:

El Greco to Velazquez: Art during the Reign of Philip III

Great Company: Portraits by European Masters

Preserving History, Making History: The Museum of Fine Arts, Boston

Winslow Homer: American Scenes.

**Museum of Science** – Phone 617-589-0100 or see website [www.mos.org](http://www.mos.org) for hours. Pass admits 4 people at \$5.00 per person. Current exhibits include:

The Alps (IMAX)

Grand Canyon Adventure: River at Risk (IMAX)

Bugs! (3D Cinema)

The World of Sharks (3D Cinema)

3-D Sun (3D Cinema)

(See MUSEUMS on next page)





*(MUSEUMS continued from previous page)*

What Happened to Pluto? (Planetarium)

**New England Aquarium** – Phone 617-973-5200 or see website [www.neaq.org](http://www.neaq.org) for hours. Pass admits 4 people at \$7.00 per person.

**Peabody Essex Museum** – Phone 978-745-9500 or see website [www.pem.org](http://www.pem.org) for hours. Pass admits 2 people for general admission.

Wedded Bliss: The Marriage of Art and Ceremony

Body Politics, Maori Tattoo Today

Stage Idols, Japanese Kabuki Theater

Gateway Bombay

Perfect Imbalance, Exploring Chinese Aesthetics

**Zoo New England** - 617-541-5466 (for both Zoos); Phone or see website [www.zoonewengland.com](http://www.zoonewengland.com) for hours. Pass admits 4 children and 2 adults for free to either zoo. This pass needs to BE RETURNED to the Library after use.

Hope N. Tillman

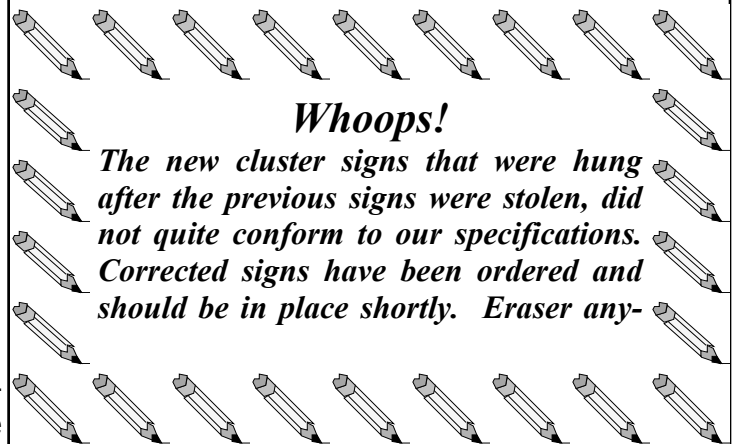
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**WOBURN LIBRARY SOURCE OF OLD IRONSIDES NAVAL HISTORY**

**D**id you know there is a connection between the Woburn Public Library and the USS Constitution Museum in Charlestown? Well, the library didn't know it until very recently.

The story begins in the War of 1812 against England. On August 19 of that year USS Constitution's historic fight with HMS Guerriere took place some 600 miles east of Nova Scotia. After 20 minutes the Briton's mizzenmast falls, and a short time later both her remaining masts go overboard. At some point in the battle, someone reportedly sees a British shot bounce off USS Constitution's side, and shouts, "Huzzah! Her sides are made of iron!"-and so was born the nickname "Old Ironsides."

In 1813, a young painter, George Ropes, born deaf and mute, the son of a shipmaster, rendered four paintings depicting the progress of the battle. His source for information is not known for certain, but he probably had contact with sailors and

*(Continued on page 10)*



**Whoops!**

*The new cluster signs that were hung after the previous signs were stolen, did not quite conform to our specifications. Corrected signs have been ordered and should be in place shortly. Eraser any-*

**NOTICES**

**Items, Services to Sell  
 Items, Services Wanted  
 Contractors You Like  
 Restaurants You MUST Try  
 Your Favorite Recipes  
 Looking for partners for bridge?  
 Mahjonn? Tennis?  
 Put out your call in  
 The Quail Runner!**

**Do you have something that  
 would go in this space?  
 Let us know!**



(Continued from page 9)

officers who had first-hand knowledge.

The paintings' path from 1813 forward is lost, but they next turn up in the Woburn library in 1938 . The then librarian wrote a report to the trustees which stated that "we find no record of when they came to the library nor who presented them." He also stated that they had been "in our attic museum for many years."

Recently the library was in the middle of a capital campaign to fund its renovation and put the paintings up for auction. The USS Constitution Museum is a private, non-profit institution in the Charlestown Navy Yard adjacent to Old Ironsides. The museum's trustees heard that the paintings were available at Sotheby's auction house and started its own capital campaign to acquire them. It was successful in its quest,

and the paintings now hang in the museum.

The museum is open to the public daily, except Thanksgiving, Christmas Day and New Years Day. Admission is free (donations gladly accepted). It is a wonderful activity for adults and grandchildren. Their website is at [www.usconstitutionmuseum.org](http://www.usconstitutionmuseum.org).

- Painting 1—Constitution first sights Guerriere
- Painting 2—The engagement in battle
- Painting 3—Guerriere is dismasted
- Painting 4—Guerriere burns





## FUTURE FORECASTING

[This article is from *The Regeneris Report*, a monthly publication for managers of Home Owners Associations.]

**P**reparing for and overseeing a homeowner association's finances are perhaps the most important board responsibilities. It takes money and careful planning to maintain and preserve common area property. One of the best forecasting tools – a “reserve study” – is needed to identify common element components, their useful lives and cost of repair or replacement. Unlike the weather, this is one forecast that actually happens pretty much as predicted. Reserve plans generally cover a 30 year projection period so that roofs, decks, fences and other long-lived and expensive components can be included. They analyze several aspects of the components:

**Physical Analysis.** A site inspection evaluates the current condition of each reserve component with the goal of determining it's: a) remaining useful life, and b) useful life when new. (If the construction is new, both a) and b) will be the same.) The inspection may also reveal improper construction or material which the board should consider correcting sooner (if structural failure, dry rot, etc. is indicated) or later if improved materials and designs are now available and it just makes sense to upgrade.

**Financial Analysis.** The financial analysis includes taking into account what the HOA currently has in its reserve fund, how much it will cost to fund future repairs and replacements, current rate of area inflation and rate of return on invested reserve funds. The term “Percent Funded” is an important indicator and it works like this: Each reserve component has an ideal amount that should be set aside each year to be 100% Percent Funded. For example, if a roof has a 20 year life and costs \$200,000 to install, \$10,000 ( $\$200,000 \div 20$  years) should be reserved each year to be 100% Funded. So, in the roof's third year of life, \$30,000 should be in reserve. If, say, only \$15,000 of that \$30,000 is reserved, the roof is only 50% Funded at that point in time. Repeating this ex-

ercise for all the reserve components will produce an overall Percent Funded. The value of being 100% Funded is that there will be no need for special assessments in the future. The 100% Funded approach is fair to all members along the 30 year time line since all are paying their full share as years pass. If the reserve plan indicates the HOA is less than 100% Funded, a contribution plan can increase that level toward 100% over a period of years to close the gap.

**Reserve Fund Investing.** One great part of the Financial Analysis is that the board has a clear picture of when reserve funds will need to be spent. This permits an investment strategy to generate interest income. The better job the board does on investments, the less money that needs to be contributed by the members. Since there are a variety of investment options available, the board should typically look for the highest returns on Certificates of Deposits which exceed the current rate of inflation. Money market and savings accounts typically yield far less than the rate of inflation so reserve funds will actually lose value. The importance of getting the highest (yet safe) yields cannot be understated. Interest revenues can yield tens or hundreds of thousands of dollars over a period of 30 years.

**Answer the Nay Sayers.** Some members are reluctant to contribute to reserve funds because they feel that reserves will benefit future owners which may not include them. In reality, a properly and consistently funded reserve plan fairly divides costs up *in proportion to the benefit received*. If reserves are collected monthly, for example, each owner pays for only the actual benefit received for that month. While the reserve money may not be spent for years in the future, those paying in get exactly what they paid for, no more, no less.

**Be Lender Friendly.** Mortgage lenders are paying closer attention to the signs of a well managed HOA when they qualify buyers for loans. The reserve study is routinely found on lender information request forms. Lenders know that the better the HOA's planning is, the

(See **FORECAST** on next page)



**The Quail Runner needs to hear from you.**

We ask that all Unit Owners try to contribute material for publication. We will accept almost anything – social notes, requests for participation in activities, items wanted to buy or to sell, essays, editorials, poetry, letters, wildlife sightings, tips for Unit Owners, restaurant reviews, photographs (we publish in black and white only), etc. Please send any of these to the editor by August 29th for inclusion in the next (September, 2008) issue of the *The Quail Runner*. Articles should be limited to 500 words. The Trustees reserve the right to accept, reject, or modify any submission. We cannot publish anonymous submissions. The editor can be contacted by e-mail or by mailing articles, questions or other submissions via US Postal Service.

**(FORECAST continued from previous page)**  
more secure their collateral will be.

**Be Buyer Friendly.** Most home buyers are stretched to the limit on home purchases. The last thing they need is a special assessment to complicate their finances. With a proper reserve plan, large expenses can be anticipated and funded years ahead of time. When the board advises all owners the plan, surprises and special assessments are eliminated. It just makes sense that homes in HOA's that are well managed sell for more and faster.

**Update Your Forecast Yearly.** The key to keeping a 30 year forecast accurate is by making small course corrections along the way. Reserve plans need to be reviewed each year and adjusted as needed. Even if no reserve related work is done, the rate of inflation, return on invested reserves and Starting Balance in reserves changes each year. Each of these variances has a significant impact on the projections. There is a great future in forecasting. Don't let your future become your past.

*[The Trustees are pleased to report that the Association's finances are solid. We have a recent reserve study done by Noblin & Associates, an engineering firm, and we have reviewed and updated it this year. We are funding our reserves at almost 100%, are investing in high-yield CD's, and should be able to meet future repairs and replacements without the need for special assessments.]*

**Board of Trustees**

- Joel Alpert 781-932-9216  
jalp@comcast.net
- Richard Clarke 781-935-3827  
ra.clarke@comcast.net
- Jack Deasy 781-935-4089  
jdeasyjr@aol.com
- J. Joseph Fitzsimmons 781-376-0250  
fitzsimjj@comcast.net
- Joel Seidman 781-937-0406  
jseidman@massmed.org

**American Properties Team, Inc. (APT) Our Management Team**

- Dave Mussen, Senior Property Manager  
781-932-9229 Ext. 678  
Fax 781-935-4289  
dmussen@aptfin.com  
500 West Cummings Park, Suite 6050  
Woburn, MA 01801
- Kathy Asmar, Condo Coordinator  
kasmar@aptfin.com Ext. 222
- Rich DeFilippo, Maintenance Supervisor  
781-933-1618 (Voice & Fax)

**The Quail Runner**  
is published four times a year.  
Contact Joel Seidman at  
781-937-0406

**jseidman@massmed.org**  
to submit material for publication.

**Volunteer Opportunities**

**Volunteers are needed to write for The Quail Runner. Please call Joel Seidman 781-937-0406 for more information.**

**Are you interested in helping out on a Social Committee? Share your ideas and skills. Call Florence Fitzsimmons at 781-376-0250.**