BARKAN
MANAGEMENT COMPANY

WHAT WE OFFER

Full-Service Management

Full-service management means one accountable partner handling every aspect of your community, from governance and finances to maintenance and resident experience.

For over 40 years, Barkan Management Company has been a trusted partner to Boards, Associations, and owners across New England and the Mid-Atlantic. With 200+ properties and 35,000+ units under management, and an average client relationship of 15+ years, we combine proactive planning, hands-on expertise, and responsive support to help communities thrive.

Administrative Support

- Board governance & member education
- Meeting prep, attendance & protocol support
- On-site administration & daily operations
- Communication & reporting
- Payroll & HR administration for on-site staff

Resident Experience

- Move-in onboarding & welcome packets
- Rule enforcement & courtesy processes
- Barkan Mobile App — 24/7 resident access
- Real-time work order tracking & reporting
- Move-in/out coordination & transition support

Maintenance & Vendor Management

- Building systems & common area oversight
- Vendor sourcing, bidding & performance monitoring
- Contract negotiation & compliance oversight
- 24/7 emergency response & dispatch
- Post-incident reporting & claim coordination

Financial Management

- Accrual-based accounting & financial controls
- Monthly Board-ready reporting & statements
- Reserve planning & long-term capital forecasting
- Budget development & fiscal controls
- Assessment billing & collection oversight

On-Site Staffing

- Property managers & site administrators
- Superintendents & maintenance personnel
- Porters & janitorial staff
- Front desk & concierge coordination
- Staff hiring, training & performance oversight

Insurance & Risk Mitigation

- Insurance certificate tracking, compliance monitoring & renewal guidance
- Claims coordination & documentation
- Regular property inspections & follow-up tracking
- Vendor compliance oversight

READY TO TAKE THE NEXT STEP? Submit an RFP at barkanco.com

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WHAT WE OFFER

Financial Management

Sound financial management means more than paying bills and producing reports, it means giving your community the clarity, accuracy, and long-term thinking it needs to make confident decisions.

For over 40 years, Barkan Management Company has been a trusted financial partner to Boards, Associations, and owners across New England and the Mid-Atlantic. With a dedicated team of 23 accounting professionals and 90%+ on-time monthly financials, we deliver structured oversight and transparent reporting tailored to every community we manage.

Accounting & Financial Administration

- Accrual-based accounting & financial controls
- Accounts payable, receivable & revenue tracking
- Financial recordkeeping & audit-ready documentation
- Assessment billing & collection oversight
- Payments, expense management & vendor processing

Budgeting & Long-Term Planning

- Annual operating budget development
- Long-range financial forecasting & capital planning
- Reserve funding analysis & assessment support
- Guidance on special assessments & funding
- Collaborative planning with leadership

Clear, Transparent Reporting

- Accrual-based financial statements prepared monthly
- Board-ready reports designed for review & audit
- Real-time data access through secure platforms
- Clear explanations & responsive financial support
- Role-based permissions & robust data security

Lifecycle Financial Support

- Audit preparation & document management
- Onboarding with financial orientation
- Continuous monitoring of financial performance
- Support through property & ownership changes
- Streamlined processes that enhance transparency

Need More Flexibility? Discover Financial Plus

If you're exploring our Financial Management service but need support that goes beyond finances, Financial Plus may be the right fit. Financial Plus is a separate, standalone contract that bundles Barkan's complete financial management offering with select operational support, giving you more than a financial-only engagement without committing to full-service management. Same Barkan financial standards, broader scope.

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Financial Plus

Not every community needs full-service management, but most need more than accounting alone. Financial Plus is a standalone service that gives your community a strong financial foundation with the flexibility to add the operational support that fits your specific needs.

For over 40 years, Barkan Management Company has been a trusted partner to Boards, Associations, and owners across New England and the Mid-Atlantic. With 200+ properties and 35,000+ units under management, and an average client relationship of 15+ years, we deliver the same rigorous Barkan standards in a contract built around your priorities.

Financial Management

- Accrual-based accounting & financial controls
- Accounts payable, receivable & revenue tracking
- Collaborative budget development & reserve planning
- Monthly financial reporting & Board-ready statements
- Long-term forecasting & reserve funding strategy

Board & Governance Support

- Meeting preparation, materials & attendance
- Financial context & reporting for Boards
- Ongoing governance guidance & advisory support
- Policy navigation & community priority planning
- Support for complex decisions & Board transitions

Operational Support

- Vendor sourcing, bidding & contractor coordination
- Contract negotiation & performance monitoring
- Maintenance request coordination & follow-up
- Building systems monitoring & oversight
- Select day-to-day operational support services

Scalable, Customizable Delivery

- Identify exactly which services you need
- Pay only for what your community requires
- Service model that adapts with your community
- Seamless transition to full-service management

How do I know if Financial Plus is right for my community?

Financial Plus is designed for communities that have outgrown a financial-only engagement but aren't ready for, or don't require, full-service management. If your community is self-managed, transitioning between management structures, or simply needs more support than your current financial arrangement provides, Financial Plus may be the right fit. We're here to help you identify exactly what your community needs.

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WHAT WE OFFER

Strategic Consulting

Whether you're planning a new development, navigating a complex operational challenge, or seeking an objective review of how your community is structured and managed, Barkan's Strategic Consulting brings decades of hands-on expertise to bear.

For over 40 years, Barkan Management Company has been a trusted partner to communities across New England and the Mid-Atlantic. With 200+ properties and 35,000+ units under management and an average client relationship of 15+ years, we work as a neutral, trusted partner, providing clear analysis, practical recommendations, and Board-ready deliverables that support informed decision-making and long-term community success.

Development Consulting

- Comprehensive budget projections
- Financial modeling for pre-opening & stabilization
- Reserve funding analysis & capital planning
- Development of community rules & regulations
- Structured transition timelines

Operational & Financial Consulting

- End-to-end operational review across all functions
- Identification of service gaps & cost inefficiencies
- Benchmarking against industry standards
- Objective analysis of shared costs
- Financial review, budget analysis & reserve planning

Barkan's Strategic Approach

- Independent analysis free from operational bias
- Findings grounded in data & documentation
- Structured project timelines with defined milestones
- Executive summaries & supporting documentation
- Scoping process that aligns deliverables with goals

Integration with Barkan Services

- Available to new & existing clients
- Seamless integration with other Barkan services
- Consistent standards & reporting frameworks
- Flexible engagement terms that adapt as your community's needs grow

How do I know if Strategic Consulting is right for my community?

Barkan's Strategic Consulting is designed for any community that needs an objective, expert perspective on a specific challenge or decision. If you're a developer preparing for transition, a Board evaluating your current management structure, or an owner seeking an independent financial or operational review, Barkan's consulting team can scope an engagement around your specific needs.

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WHAT WE OFFER

Compliance Solutions

Our Compliance Solutions services are designed to support owners and managers by handling the detailed requirements of affordable housing programs, helping properties remain aligned with federal, state, and local standards while reducing administrative burden and compliance risk.

For over 40 years, Barkan Management Company has been a trusted partner to affordable housing communities across New England and the Mid-Atlantic. With 200+ properties and 35,000+ units under management and an average client relationship of 15+ years, our compliance team brings the same standard of care and precision to your regulatory obligations as we do to every aspect of your community.

Certification & Eligibility Management

- Initial & annual certifications
- Income & eligibility verification
- Document collection & file prep
- Timely program submissions
- Housing agency coordination
- Wait list management & leasing support

Regulatory Reporting & Oversight

- Required program report preparation
- LIHTC, HUD & Section 8 compliance
- Deadline & renewal tracking
- Program-specific compliance support
- MassHousing, CHFA, RI Housing, Navigate & MaineHousing coordination

Audit Preparation & File Maintenance

- Resident file organization & maintenance
- Audit-ready documentation
- Pre-audit internal reviews
- Standardized file organization
- Quality control reviews

Training, Guidance & Support

- Staff & leadership compliance training
- Resident eligibility communication support
- Program standards policy review
- Troubled property compliance support
- Available with or without full management

Allocation Methodology Review

- Review of existing cost-allocation methodologies across multiple entities
- Recommendations for well-documented, defensible adjustments

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BARKAN
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VALUE PLUS PROGRAMS

Reserve Advantage

Reserve planning plays a critical role in a community's long-term financial health, yet it's often one of the most overlooked. Reserve Advantage provides a structured, technology-enabled approach to monitoring and optimizing reserve funds, supporting safety, liquidity, and informed decision-making over time.

Reserve Advantage is available exclusively to Barkan-managed communities as part of our Value Plus Programs, an additional layer of specialized support built on the relationships and expertise Barkan has developed over 40+ years. With 200+ properties and 35,000+ units under management, and an average client relationship of 15+ years, we bring the same standard of care to your reserves as we do to every aspect of your community.

Reserve Analysis & Strategy

- Review of existing reserve structures & balances
- Identify opportunities to improve interest potential
- Consideration of timing, fund allocation & maturity
- Support designed to inform leadership-level planning
- Access to specialized reserve management platforms

Integration with Advisors & Frameworks

- Works alongside existing financial advisors
- Integration with Barkan's broader financial reporting
- Defined scope aligned with policies & controls
- Structured coordination & decision protocols
- Consistent reporting standards

Ongoing Monitoring & Reporting

- Active monitoring as reserve investments mature
- Monthly electronic statements & reporting access
- Visibility into balances, positioning & performance
- Regular market context to support planning
- Transparency through regular reporting cycles

Secure Accounts & Network Access

- Universal account access across multiple banks
- Fully insured deposits (FDIC/NCUA) with extended coverage opions
- Network of established financial institutions
- Centralized platform for streamlined oversight
- Secure setup & administration

How do I know if Reserve Advantage is right for my community?

Reserve Advantage is designed for Barkan-managed communities looking to take a more strategic, structured approach to their reserve funds. If your community is holding significant reserves, approaching a major capital project, or simply wants greater visibility and confidence in how your funds are positioned, Reserve Advantage may be the right next step. Speak with your Barkan management team to learn more.

INTERESTED IN LEARNING MORE? Reach out to your Barkan representative

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VALUE PLUS PROGRAMS

Loan Advantage

Financing decisions can shape a community's long-term financial health. Loan Advantage provides structured guidance to help Boards evaluate, compare, and secure financing for capital improvements and maintenance projects, built on trusted lender relationships and informed, risk-aware oversight. Final loan decisions, approvals, and agreements are subject to leadership authority, lender terms, and professional advisement.

Loan Advantage is available exclusively to Barkan-managed communities as part of our Value Plus Programs. With 40+ years of experience, 200+ properties and 35,000+ units under management, and an average client relationship of 15+ years, Barkan brings the same standard of care and discipline to your financing process as we do to every aspect of your community.

Evaluate Financing Readiness

- Pre-qualification review of loan requests
- Assessment of community financial position
- Review of budget, YTD financials & delinquency
- Guidance on lender qualification criteria
- Early clarity to support informed discussions

Explore Financing Options

- Single point of contact to engage multiple lenders
- Comparison of loan structures, terms & rates
- Identification of options aligned with project scope
- Support interpreting lender proposals
- Guidance on reserves, special assessments, etc.

Coordinated Closing Support

- Coordination through documentation & closing steps
- Clear timelines and expectations from start to finish
- Structured support through loan execution & closing
- Typical timeline: 90+ days from pre-qualification to closing

Structured, Risk-Aware Approach

- Capital improvement & maintenance planning
- Risk-aware financing discussions
- Understanding of alternatives & implications
- Community has final decision-making authority
- Consistent with Barkan's financial controls

How do I know if Loan Advantage is right for my community?

Loan Advantage is designed for Barkan-managed communities planning a capital improvement or major repair where reserves alone may not cover the full cost. If your Board is evaluating financing options, navigating lender conversations for the first time, or simply wants structured guidance before committing to a loan, Loan Advantage provides the clarity and coordination to move forward with confidence.

INTERESTED IN LEARNING MORE? Reach out to your Barkan representative

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BARKAN
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VALUE PLUS PROGRAMS

BEST - Barkan's Energy & Sustainability Team

Energy markets are complex, dynamic, and increasingly influential on a community's financial health. BEST, powered by Usource, a leading energy consulting firm, provides specialized energy and sustainability insight designed to help Barkan communities navigate this environment with clarity and confidence.

BEST is available exclusively to Barkan-managed communities as part of our Value Plus Programs. Through our partnership with Usource, Barkan communities gain access to dedicated energy expertise, a robust supplier network, and a fully transparent, unbiased procurement process.

Dedicated Advisory & Market Expertise

- Dedicated Usource energy advisor
- Strategy development aligned with community goals
- Evaluation of potential energy initiatives
- Guidance on rebates, incentives & regulatory updates
- Coordination with vendors & suppliers

Unbiased Procurement Oversight

- Access to Usource's network of qualified suppliers
- Fully transparent, unbiased bidding & evaluation
- Contract review focused on structure, term & risk
- Ongoing performance review & renewal planning
- Budget-focused hedging insight

Market Insight & Program Navigation

- Understanding of regional energy markets & pricing
- Guidance on renewable programs & community solar
- Utility engagement & program enrollment
- Awareness of policy changes & compliance
- EV charging stations assessment & implentation

Integrated Energy Solutions

- Electric & natural gas procurement
- Energy efficiency assessments & planning support
- Evaluation of on-site generation & renewable options
- On-site & community solar, where needed
- 24/7 monitoring for savings opportunities

How do I know if BEST is right for my community?

BEST is designed for Barkan-managed communities looking to take a more proactive, informed approach to energy costs and sustainability planning. If your community has significant common-area energy usage, is approaching a contract renewal, wants to explore solar or efficiency opportunities, or simply wants better visibility into your energy spend, BEST can help.

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BARKAN
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VALUE PLUS PROGRAMS

Barkan Maintenance Team

Managing day-to-day maintenance needs requires reliable, consistent support, not a different vendor for every work order. The Barkan Maintenance Team is an in-house maintenance service currently only available to Massachusetts-based Barkan-managed communities, providing coordinated, flexible support across a wide range of building needs.

With 40+ years of experience, 200+ properties and 35,000+ units under management, and an average client relationship of 15+ years, our team brings the same standard of care to your building's maintenance as we do to every aspect of your community.

Repairs & Building Maintenance

- General repairs & carpentry
- Drywall patching & painting
- Flooring — vinyl, carpet & tile
- Caulking, weatherproofing & seasonal prep
- Common area upkeep & punch list items

Cleaning & Facility Services

- Janitorial & common area cleaning
- Trash & waste management
- Recurring, scheduled cleaning programs
- Common area appearance & condition oversight
- Coordination with building staff & on-site teams

Coordination & Projects

- Multi-unit & building-wide work orders
- Preventive & recurring maintenance scheduling
- Vendor coordination for licensed trades
- Oversight & support for multi-trade projects
- Renovation & improvement proposals per scope

Licensed Trade Support

- Coordination of licensed trade services
- Fire alarm & elevator service coordination
- Plumbing, electrical & HVAC coordination
- Access, sequencing & communication management
- Oversight ensuring licensed work is completed

How do I know if the Barkan Maintenance Team is right for my community?

The Barkan Maintenance Team is designed for Barkan-managed communities looking for reliable, in-house maintenance support without the complexity of managing multiple vendors. Whether your community needs recurring scheduled maintenance, occasional repairs, or coordinated project support, our team can be structured around your specific needs.

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