



## Vertex HQ: From Vision to Implementation

Designing a workspace to bolster a rich culture of collaboration and unifying employees in a single location were the main, driving forces behind Vertex, Inc.'s search for a new corporate headquarters. Vertex, which defines itself as a privately held organization that provides companies of all sizes proven tax automation and data management solutions that simplify the complex, had 650 employees spread amongst seven different offices in the Philadelphia area alone. In addition to their need to achieve collaboration and unity, the new workspace had to help accelerate company results and enable employees to do their best work for years to come, all while honoring their values of respecting and engaging employees throughout the process.



The Vertex team, co-led by Lainie Sitko, director of workplace strategy, and Chris Kohl, chief information officer and vice president of corporate technology, began the four-year search for and implementation of a new headquarters by first defining the vision for the future workplace. The team partnered with Root, Inc., who specializes in change management, to engage the organization in an interactive visioning process that connected strategy with people and culture. Participation in the process was open to all employees and was followed by a carefully thought-out cadence of surveys, research, and discussions.

After identifying company strategy and culture with Root, Vertex enlisted the help of Matthew Feeney and Steven Stefanski of Cresa to begin the search for the physical space to facilitate their vision. Feeney illustrated the challenge he and his team faced in distilling the information Vertex had gathered over the past three years and enabling them to reach a decision. To help this process, Feeney

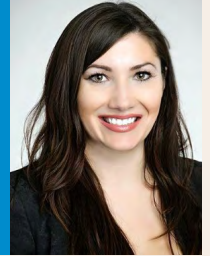
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## Volunteer Spotlight

### Tricia Sullivan

Senior Consultant  
Advanced Office  
Environments

Corenet Volunteer Position  
Co-Chair of Communications



### I chose to join Corenet because...

Judy Ginieczki and Ed Piscopo, current Board Members, piqued my interest. Their commitment and dedication to the organization told me there was something special about CoreNet so I started attending events. They were right!

**The 2018 Corenet event I am most looking forward to is...** Annual Golf Outing.

**My most unique real estate assignment has been...** working with an international client. Today's technology makes communication very easy. I am able to work with my client and the designer in real time to design and make changes, significantly reducing the number of revisions on a project and streamlining the process.

**When I'm not at work or at Corenet events, you'll find me...** at a concert, any concert. I love live music!

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## Don't Miss These Events!

- March 1 **Young Leaders Happy Hour**  
City Tap House - Logan Square, Philadelphia, PA
- March 21 **End User Dinner**  
Fork, Philadelphia, PA
- July 30 **Annual Golf Outing**  
Philly Cricket Club, Flourtown, PA

Visit the [events section](#) of the chapter website for more information and to register.

## CoreNet Global Knowledge Center and Research

The CoreNet Global Knowledge Center is the single source for corporate real estate research. An important benefit to our members, the library contains original research, member organization publications, market reports and industry specific research reports and white papers. Search for what you need, browse the knowledge topics and simply ask the Librarian if you need assistance.

Get started with the Knowledge Center:

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## Executive Committee

Greater Philadelphia Chapter

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**Mark Golboro** • AIG

Vice President/President-Elect:

**David Kontra** • GE

Treasurer:

**Matt Knowles** • CBRE

Past President/Advisor:

**Chuck Bagocius** • TD Bank

Past President/Advisor:

**Ken Zirk** • CBRE

CoreNet Global

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Atlanta, GA 30303

## Letter from the President

Dear Fellow Chapter Members,

Happy New Year and I hope everyone had a joyous holiday season! It is with great honor and humility that, as of January 1, I assumed the reins as your chapter president and will serve for the next two years. During 2017 as chapter vice president, I was privy to the continued evolution of the chapter under Chuck Bagocius' direction. His leadership and professionalism provided me with a great foundation to take on this responsibility. I want to extend my appreciation to Chuck and the entire board for their continued support and enthusiasm for the chapter. Their dedication and commitment has led the CoreNet Philadelphia Chapter to great success, most recently evidenced by winning the 2016 Chapter of the Year Award. My job during the next 2 years is to support the members and the board to build on these successes to better position the chapter for the future.

One of the ways I hope to accomplish this is by improving our real estate, end-user engagement and young professional involvement in the chapter. It is my belief that the foundation of a successful chapter is, in large part, dependent upon a foundation built by a strong and involved end-user community and a pipeline of new ideas from young industry professionals. The board met this December and January to develop strategies to help us focus on these important constituents. As a result, you will see and hear of new initiatives over the coming year that will emphasize this community. This long-term chapter commitment will take patience and years of investment in time and resources, but will yield substantial dividends for us all. We will also continue to work hard to address concerns and alleviate barriers to allow for participation from all chapter members.

Another important initiative during my tenure is for me to better understand the needs of our existing members. As a chapter, we need to be able to connect with one another and share mutually beneficial information that can help each and every member accelerate his or her career. The chapter strives to become a real estate industry information resource for our members, so keep an eye out for requests for information about you and your company's capabilities in the coming future.

These are just a few of the goals I set out to achieve in the coming years. I look forward to becoming even more acquainted and connected with the wide variety of our volunteer board, chapter members, and our valued, corporate sponsor partners. The enthusiasm of our members and continued, strong support from our corporate sponsors makes my job as president no less daunting, but certainly easier, and, for that, I am profoundly appreciative.

Wishing you all a successful 2018 and I look forward to working with everyone throughout the years to come!

Sincerely,



**Mark Golboro, AIG**

President, CoreNet Global Greater Philadelphia Chapter



# Annual Golf Outing

July 30, 2018

Philadelphia Cricket Club  
6025 West Valley Green Road  
Flourtown, PA 19031

Save  
the  
Date!

Outing will feature two 18-hole courses, golf clinic,  
and new this year a tennis tournament.

## EVENT RECAPS

### Transforming Real Estate

The University Relations committee hosted an enlightening panel discussion, Transforming Real Estate, based around embracing the wellness movement and challenging the typical approach to design and development. Mark Strauss, Strategic Advisor for IWBI/WELL passionately led the discussion. Mark was joined by Martha MacInnis, Design Director at TD Bank Group, James Stawniczy, Senior Consultant, Wellness at HOK, Tony Ewing, Vice President at Liberty Property Trust and Carlo Beuf, Director of AV, Cenero.

The accomplished panelists champion wellness and sustainability within their organizations. Martha MacInnis and her team at TD Bank Group along with James and designers at HOK are responsible for completing the very first WELL Certified Project in Toronto. Tony Ewing provided pointed insight into the future of development and leasing with organizations like TD Bank investing in the overall wellbeing of their employees. Carlo rounded out the discussion with the realities of working with clients long term whose primary focus is the employee experience.

Drexel University hosted this event at the URBN Center Annex with a cocktail reception preceding the panel discussion. The crowd of over 75 comprised of local students pursuing degrees in design and real estate, professors, and local professionals. The conversation concluded with Mark prompting the crowd to consider how we can all better educate and inspire our clients, tenants, and financial interests in terms of designing and building for positive human WELL being and Health.



### Volunteer Spotlight *continued from page 1*

**I am originally from...** Far Northeast Philadelphia.

**The best piece of advice I ever received is...** The best way to get through a hard time is by helping others get through their hard time.

**My favorite thing about Philly is...** The history, the food, the murals....it's impossible to just pick one

**If I had to take a tourist to one Philly area destination, it would be...** Reading Terminal Market

**Growing up, I wanted to be...** a dentist, an actress, a lawyer

**My favorite vacation destination is...** Barcelona - the beach, mountains, culture, architecture, history, food ...it has it all

**The best book I've read is...** The Westing Game. It's a murder mystery children's book that really made me think while teaching me some life lessons.



# CoreNet Winter Social

The holiday festivities continued into January with the CoreNet Winter Social. Close to 100 industry professionals were able to take look at 1735 Market Street's brand-new amenity floor, The Lounge, designed by Meyer Design. Attendees enjoyed a game of pool, incredible Center City views, an array of delectable cuisine, and good conversation. Special guest, Harold Barrow from **ACHIEVEability**, shared his heroic story of overcoming addiction and homelessness turning his life around to provide for his young daughter. In many ways, he owes his success to this organization, which is CoreNet's new, charitable organization partner for 2018. To learn more, please visit [www.achieveability.org](http://www.achieveability.org). Thank you to all of those who brought donations to the event and thank you to our event sponsors Focal Point Project Management, Macro Consultants, Meyer Design, and Spectrum.

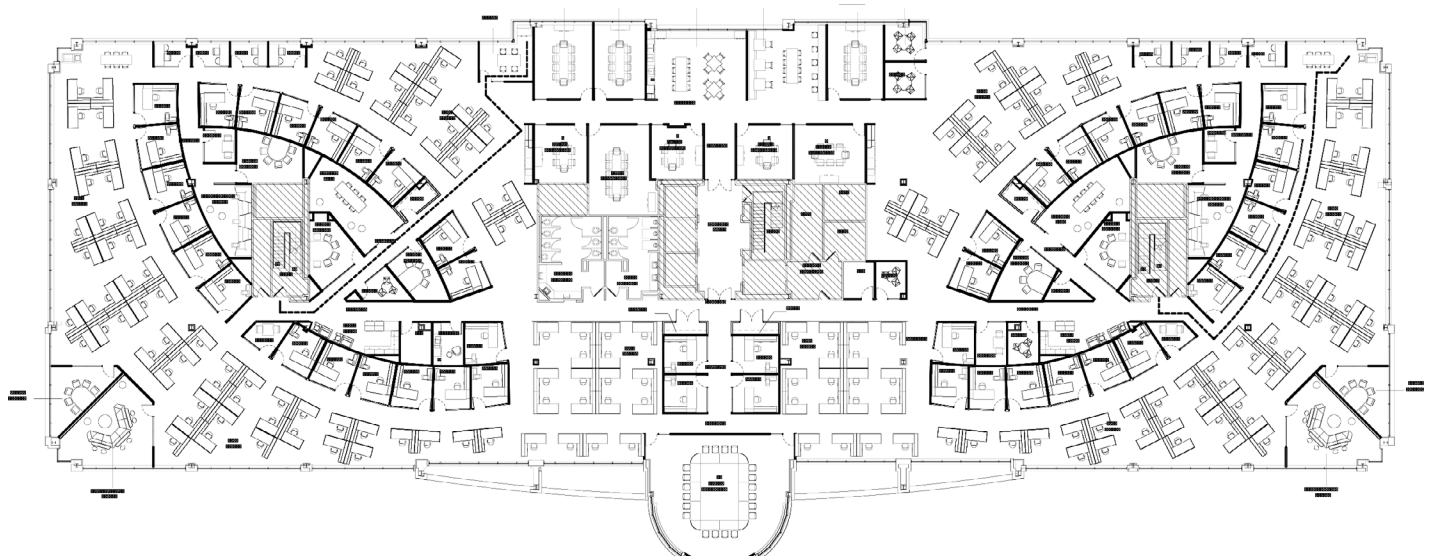


and Stefanski utilized a consensus-building tool, the PairWise Survey, to identify the criteria against which all solutions could be measured. These criteria were ranked in order of importance. No surprise, number one on their list was collaboration. Knowing that they would have gone wherever they needed to achieve this, Feeney and Stefanski had to narrow the search. “Our talent is here,” explained Sitko, so they targeted the Greater Philadelphia area.

Once the criteria for the real estate strategy was established, Vertex engaged with Francis Cauffman to create their workplace strategy. The most important part of the year-long

helped them to narrow the list of potential buildings. “The search was very analytical,” explained Feeney.” In a data driven organization, it became about what could be done on the floor plate and 2301 Renaissance Boulevard hit the mark.

Once Vertex selected the site, the hard construction of the space was relatively easy because so much research, planning, and visioning was already complete. With David Heckler, principal at Watchdog Real Estate Project Management, overseeing the project, it only took 10 months from documentation to construction to realize their vision.



process, Ann Hoffman, director of interior design services, described, were the utilization studies conducted at all seven of the local Vertex offices. Hoffman and her team spent weeks observing patterns and interviewing employees to understand how Vertex operated and what could be done to improve its function and maximize collaborative events. Hoffman wanted to increase opportunities for what she described as “collisions” or impromptu meetings or discussions. Given the employees’ sensitivity to noise, there needed to be natural, yet defined, areas for this to occur. Their previous, cube-intensive offices lacked places to do this, which reduced productivity. Hoffman described their, then current, workplace as a bunch of “little suburbs with no city heart.” As Vertex toured local buildings with Feeney, Stefanski, and Francis Cauffman, their collective strategies gave them a clear vision of what the opportunities and detractors were for each prospective building.

The need for a “city heart” led to their vision for a “town center”, a meeting space that could hold the entire local headquarters’ population. This, in addition to the design of their intentional cat-eyed, curved floor plan with plenty of meeting spaces, shortened site lines and created intimate “neighborhoods”,

Over a period of three days, their seven locations and 650 employees moved into their 168,000 square foot new home. The move went incredibly smooth and each person was up and running in about an hour, explained Sitko. Although the employees have yet to take an official survey, informal feedback has been very positive. With a 75% increase in meeting spaces, an innovative and inviting Town Center, sit-to-stand desks, multiple team rooms, an outdoor patio with Wi-Fi, and so much more, what is there not to love?

Vertex’s four-year, unconventional search for a new headquarters generated more value than any organization could ever hope to achieve. Their drive to create a facility to support their team culture, while also holding true to their values founded in a commitment to and respect for people, was an incredible success and one from which others in the market can learn. Vertex proved that the return on taking the time to clearly define vision, values, and mission from the start, then assembling a team to help deliver, was well worth the time, energy, and money invested.



## Call for Volunteers!

CoreNet Philadelphia is looking for eager volunteers! There are many ways to get involved such as helping a committee, hosting an event at your facility, speaking at an event, writing an article for the newsletter, and more. Please [let us know](#) if you are interested!

**NOTE:** You must be a CoreNet member to volunteer for a committee.



## Welcome New Members

Maureen Anastasi	• CBRE
Hugo Amelink	• SKB Architecture & Design
Patrick Brady	• Avison Young
Susan Jansen	• Haworth
Jessica Jozwiak	• Comcast Cable
Jason Kramer	• Binswanger
William Kropp	• PriceWaterhouseCoopers
Nicholas Luczyszyn	• NorthStar Owners Representation
Nicole McDevitt	• JLL
Katie Milgrim	• JLL
Chris Moyer	• Cecil County Office of Economic Development
Tim Nienhuis	• JLL
Sunny Patel	• Comcast
John Schmidt	• Bridgewater Associates, LP
Brendan Smith	• Student
John Susanin	• Colliers International
Jennifer Tidd	• Gensler



# NEWS

Winter 2018

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Francis Cauffman