

## Cowart, Nick

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**From:** Sherrill Uyeda <suyeda@alliancerc.com>  
**Sent:** Tuesday, November 05, 2019 12:05 PM  
**To:** Cowart, Nick  
**Subject:** Candidate Info  
**Attachments:** Rodger Rees\_SI Request.pdf; Rodger Rees\_SI.pdf; Rodger Rees\_Resume.pdf; Rodger Rees\_Screening Notes.pdf

Hi Nick,

Per the County's request, attached are the communications between Alliance and the candidate.

Regards,  
Sherrill

Get [Outlook for iOS](#)

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**From:** Linda Kann <lkann@alliancerc.com>  
**Sent:** Tuesday, November 5, 2019 8:54:22 AM  
**To:** Sherrill Uyeda <suyeda@alliancerc.com>  
**Subject:** Rodger Rees

Here you go!

Linda Kann  
Special Projects & Graphics Manager  
**Alliance Resource Consulting LLC**  
[www.alliancerc.com](http://www.alliancerc.com)  
(562) 901-0769 x 300 Direct  
(562) 901-3082 Fax

Email



This email was sent with the following template:

From "David McDonald" <dmcDonald@alliancerc.com>

To rer111@bellsouth.net

Attachments **SI Form Broward-25 Dir of Port Everglades.doc**

Subject Requesting additional information for Broward County's Port Everglades recruitment

Dear **Contact's First Name**,

Dear **Contact's First Name**:

Thank you for your interest in the **Regarding Job's Company** - **Regarding Job's Job Title** position. We are interested in obtaining further information to better assist us in evaluating your candidacy. Please fill out the attached questionnaire by August 1, 2019.

We hope to present our top list of candidates to our client contacts by mid-August. Should you have any questions, please let us know.

Sincerely,  
**Sending User's Full Name**

Sent Fri Jul 26 2:56 pm

Close

Rodger Rees, CPA  
1715 Church Street  
Galveston, Texas 77550  
321-480-6600  
[rer111@bellsouth.net](mailto:rer111@bellsouth.net)

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July 30, 2019

**Name:** Rodger Rees **Location:** Galveston, Texas  
**Current Title:** Port Director/CEO **Organization:** Port of Galveston

**Reports to:** Board of Trustees of the Galveston Wharves

#### Staff

Total Organization: 90 Employees  
Total Number of Staff I oversee (below): Eight direct reports  
Director of Port Operations  
Director of Administration  
Chief Financial Officer  
Director of Security  
Director of Engineering  
Director of Mobility (parking and ground transportation)  
Director of Public Relations  
Port Director/Board Administrative Assistant  
Largest Number of Staff Overseen: See above (Port of Galveston)

Annual Budget	Operating Capital
Organization: Port of Galveston (CEO)	\$ 47 Million
Canaveral Port Authority (CFO)	\$103 Million
Portion responsible: both entities	100 percent
Largest budget for which responsible (both):	See above

#### Questions

1. Example of where I personally negotiated a Port contract with a major private corporation with details and outcome:

I have negotiated several contracts with stevedores and ship agents for cargo business. Just recently, we negotiated a new lease for wind energy components and RORO business with Ports America. These leases are for the Port's west-end cargo area. We will be relocating high and heavy equipment currently unloading on the

Port's east end. We are relocating this business to allow for new cruise terminal construction in early 2020 by Royal Caribbean Cruise Lines.

I have also recently negotiated two leases with Union Pacific Railroad for additional land. This land will be for offsite parking for employee and union workers as well as a staging area for Uber and Lyft drivers. These new leases will help make way for a proposed parking deck between Cruise Terminals One and Two. This land will also be used for wind energy and RORO that will be transported by rail and/or truck to the mid-western US (wind) or to Africa and South America (RORO).

I am currently in negotiations with a large multi-million dollar private terminal owner to fill three slips on the Port's west end. I just completed a cost share agreement for the non-federal share of dredging with the same terminal owner for dredging the extension of the Galveston Channel by the U. S. Army Corp of Engineers.

2. Experience in development of port related legislation and/or port funding:

I currently serve on the Port Authority Advisory Committee (Texas). This committee oversees certain state funded projects with the Texas Department of Transportation and is very much like the Florida Port's Council organization in Florida. Since coming to the Port of Galveston, I have hired a state legislative consultant to represent the Port in front of the state legislature in Austin, Texas. I have excellent relationships with our local state representatives, Mayes Middleton and Larry Taylor as well as our U.S Senator Randy Weber. I frequently visit Austin and Washington D.C. to further the port's interest both at the federal and state levels and have testified before the Texas Transportation committee in Austin as well as in offsite hearings in the local jurisdictions to encourage legislative fixes for state pilot legislation and other Port issues.

While at Canaveral Port Authority in my role of CFO, I personally negotiated bank loans totaling over \$200 million with SunTrust, Regions Bank and lines of credit with PNC Bank. Likewise, I negotiated a bond issue consisting of both taxable and tax-free components of approximately \$70 million. The proceeds were utilized to build a new cruise terminal and renovate three others.

As CFO at Canaveral and CEO at Port of Galveston, supervised all grant applications.

3. Cruise line experience:

At Canaveral Port Authority, I was member of the executive team that negotiated the operating agreement for the construction of Cruise Terminal One, which was built for Royal Caribbean. I was solely responsible for construction financing and for the structuring of all financial aspects of the contract, which included including capital recovery charges and new tariff charges to Royal Caribbean so the port could recover capital costs of the \$105 million construction.

As CEO at Port of Galveston, I negotiated a new 20-year berthing agreement with Disney Cruise lines. The Agreement called for Disney paying full tariff as well as the elimination of the bundled billing component. Over the first five years of the

Agreement, Disney Cruise lines doubled their seasonal homeports from 12 calls to 26 calls.

Currently, I am in negotiations to finalize the executed memorandum of understanding whereby Royal Caribbean Cruise Lines will build, a new \$110 million cruise terminal on 10 acres of leased land in the Port of Galveston. We have completed the operating agreement and are currently finalizing the land lease that will have an initial term of 20 years with four 10-year options. The terminal will be able to handle the Oasis and Icon classes of ships and will allow the Port of Galveston to retain almost of all parking revenues while receiving a mid-7 figure annual rental rate.

I am having ongoing conversations with another cruise line about using Cruise Terminal Two when Royal Caribbean moves in late 2021. We completed renovations earlier this year on Cruise Terminal One to allow the Carnival Vista and Excel class to homeport in Galveston.

4. Interest and barriers in the position:

I would like to utilize my experience in a larger Port environment. The Port of Galveston has limited resources and harbors an environment not conducive to growth. In my first year as CEO, the Port had budgeted a breakeven operating income and yet I was able, through good fiscal management, to reduce expenses and generate additional revenues to increase profits to \$7 million. We are on target to achieve another record year in 2019. I am a CEO with a CFO financial background, a talent not typically found in the Port Director/CEO position. I would like to utilize this experience in a progressive environment. I have good relationships with the cruise lines and understand cargo as well as the operations of a landlord port.

I have a family in Galveston and would need to relocate back to Florida but do not see this as an impediment to accepting the Port of Everglades position. I currently own property in Florida. The posted salary is only \$16k more than my current salary.

## **Rodger Rees, CPA**

1715 Church Street

Galveston, Texas 77550

Mobile: 321-480-6600

E-mail: [rer111@bellsouth.net](mailto:rer111@bellsouth.net)

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### **CEO / CFO / COO**

Candidate is a strong decisive operating executive with extremely professional demeanor, proven leadership abilities, problem solving skills and relationship building qualities. Strategic visionary who can quickly assesses the need for action and change. Highly experienced, motivated leader in the areas of budget administration, project management, business development, policy, and finance. Respected mentor who maintains employee loyalty and trust while effectively delegating authority. Excellent communicator with refined interpersonal and presentation skills. Experienced negotiator with proven positive bottom line results while never losing focus on needs of employees and customers (public).

Acquisitions and Public-Private Partnerships  
Strategic Planner and Negotiator  
Convincing and Motivating Leader  
Mindful of Political Factors

Bottom Line Driven  
High Focus on Long-term Planning  
Technology Advocate  
CPA with Personality

### **SIGNIFICANT ACHIEVEMENTS**

- Successfully improved bond rating from BBB to A- without taxes collected or bonding ;
- Guided Port from a budgeted breakeven to a profit of \$8M in first year while posting record revenues and at the same time totally revamping its operational and security organizational structure;
- Negotiated land lease contract, including operating and construction riders, for Royal Caribbean's new \$100M terminal, new 20 year contract with Disney Cruise Lines and expansion of Carnival terminal to handle Vista class vessel;
- Implemented a comprehensive Port master plan with Bermello and Ajamil to provide Port with a sustainable unified vision for the next 20 years including a traffic flow study intended to better utilize internal road network;
- As CFO at Port Canaveral, successfully structured and closed \$205M in construction financing and implemented new port-specific ERP system at both Port Canaveral and Port of Galveston;
- Managed new Port leases for project cargo, RORO, grain and liquid bulk cargo with limited acreage available.
- Finalized Army Corp of Engineers dredging project for channel extension with cost share participation from private terminals benefitting from dredging

### **PROVEN ABILITIES AND RESULTS**

#### **Commercial and Operations**

- High level relationships with Port Board of Trustees, commercial banks, outside organizations, community organizations, pilots and regional port organizations relating to Houston Port complex (13 deep water ports);
- C-level executive with great relationships state and federal legislators, City government officials, and public and private transportation officials including the Army Corp of Engineers and TxDot;
- Understand federal regulatory compliance and financial/operations management
- Chief Executive Officer, Chief Financial Officer and Chief Operating Officer in several entities

## Financial

- 25 years' experience with all financial responsibilities for publicly traded companies as well as private and governmental entities
- Directed risk management and procurement functions as well as developed repairs and preventive maintenance plan.
- Overseer of annual independent audits; Composer of M D &A information and CAFR.

## Other

- Policy and procedures
- Diversified consulting
- Public speaker with legislative testimony experience
- Real estate construction, negotiation and property management

## PROFESSIONAL EXPERIENCE

**Port of Galveston, Galveston, Texas** 2018-Present  
**Port Director /Chief Executive Officer/TWIC Badge**

Galveston Wharves Board of Trustees (Board) appointed by Galveston City Council is the governing board of the Port of Galveston. The Board has full authority to manage the Port assets and revenues derived from those assets. The Port leases land to terminal operators and commercial establishments. It is also the fourth largest cruise port, in terms of passengers, in the United States and serves three major cruise lines. The Port employs approximately 100 employees and operates several berths for its own account. With revenues projected at \$47M for 2019, the Port has a capital budget of approximately \$600M.

**Canaveral Port Authority, Cape Canaveral, Florida** 2013-2018  
**Deputy Executive Director/Chief Financial Officer/Acting Port Director in Absence/TWIC Badge**

Canaveral Port Authority, governing body of the Canaveral Harbor Port District, is a special taxing district operating under a five-elected Commissioner-manager form of government. The Port operates four lines of business; cruise, cargo, real estate and recreation and employs 220 with an economic impact of 17,000 jobs and \$1.2B. (The Port is the only Port in Florida with resort activities for the community and cruise passengers.) The Government Finance Officers Association has awarded the Canaveral Port Authority for 26 consecutive Certificates of Achievement in Financial Reporting. As CFO and Deputy Executive Director, Commissioners unanimously appointed me as interim CEO during search process.

**Space Coast Business Consulting, Rockledge, Florida** 2006-2013  
**Business Consultant/Chief Financial Officer and Operations Officer**

Consultant for 2 public companies, 4 private companies and 1 501(c)(3) non-profit. Engaged to manage financial aspects in energy, maritime, aviation, financial services, private equity and real estate industries. Operated under Securities and Exchange Commission, and Department of Commerce (grants) regulations. Mergers and acquisitions, private equity and IPO financings, budgeting, zoning and entitlement and audit management were all part of engagements.

**Empire Financial Holdings, Inc. Atlanta Georgia-Orlando, Florida** 1995-2006  
**Chief Executive Officer/Chief Financial Officer/Chief Operating Officer**

Founded SEC regulated securities broker dealer, Centennial Capital Management, and acquired two other firms to build company revenues to \$14M. Managed initial professional staff of 25 employees, which

increased staff to 75 when company sold to Empire Financial Holdings. Recruited a sales force that grew to 250 independent contractors in 25 states with resultant revenues of \$31M and managed daily operations of publicly traded company including two subsidiaries with on-line trading component. Regulatory filings with SEC, FINRA and state securities were an integral part of responsibilities.

#### **EDUCATION / PROFESSIONAL QUALIFICATIONS**

**B. A.** Accounting, East Tennessee State University, Johnson City, Tennessee

**Certified Public Accountant**-State of Georgia

**Certified Port Executive**, MacDonnell Group-Port Operations

**Excellence in Financial Reporting**- GFOA

#### **ASSOCIATIONS AND MEMBERSHIPS**

**American Association of Port Authorities**

**Propeller Club**

**Government Finance Officers Association**

**Chamber of Commerce Board**

**Galveston Economic Development Board**

**Technical Advisory Committee – Houston/Galveston Transportation Policy Council**



## Edit Note

Edit this Note on Rees, Rodger

Regarding: [Broward County, FL - Director of Port Everglades](#)

In speaking with Rodger, I learned he graduated from college in 1978 from E. Tenn. While his resume begins in 1995, he was involved in several business's during that 17 year period. In 1989, he moved to Atlanta where he started out in Public Accounting with Jones & Cab primarily working in the real estate syndication market performing audit work. A few years later, he formed his own real estate brokerage business "[Buckhead](#) Financial" in Atlanta. This was a small securities brokerage similar to a Merrill Lynch in operation, providing real estate investment advice to his clients. After about 10 years, he sold the firm (1995) and opened another similar firm called Centennial Capital Mgmt. which was built up to approximately 300 financial planners and grossed \$16 million a year. He then got an offer to merge his company with Empire Financial Group and moved to Orlando to manage it first as the COO and then became CFO. In 2005, the company again merged with a NY firm and he chose not to transfer to NYC but rather established a consulting business "Space Coast Business Consultants" to assist clients that were small publicly traded co.s that needed help in their financial reporting. (Note: this is where his resume begins)

In 2013, he received an offer from Canaveral Port [Auth.](#) for the position of CFO, which was his first introduction into Seaport management and operations. He was there for 5 years before accepting the position as CEO of the Port of Galveston in January, 2018, where he is currently. Rodger has 7 years of Executive Port Administration experience, with 34 years of previous experience in the financial world.

He is somewhat familiar with union employees but has never worked at a port with internal union employees. He is currently working with the Corps on a dredging program at Galveston and is familiar with the state and federal requirements for harbor deepening and maintenance.

CONFIDENTIAL: When asked about any irregularities in a background check, he stated that in 2001, he was sanctioned by the Securities & Exchange Administration for a violation he said was caused by an associate. Nevertheless, he had to pay a \$10,000 fine and couldn't sit as president of his company for 1 year. He indicated this came up and was cleared at both Port Canaveral and Port of Galveston when he hired on at those Ports.

Last Updated: Fri Aug 16 2:15 pm by DM

Cancel

Save

Save & Close