PETER R. LAROCHE

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OVERVIEW: **Three Decades in Non-Profit Leadership, Organizational Development, Fiscal Management, Accounting, and State Government Experience**

- More than 26 years of community-based organizational leadership experience
- 10 years of non-profit, government and public university accounting, budgeting and fiscal management experience

CEO/ED EXPERIENCE

2002 - Today **PRESIDENT & CEO**
Financial Pathways of the Piedmont (formerly Consumer Credit Counseling Service of Forsyth County), Winston-Salem, North Carolina.

Nature of Business: Community based financial education and counseling service (see financialpaths.org).

Responsibilities

- Provide Board of Directors with adequate information to help them make sound strategic and policy decisions
- Work with Board of Directors and leadership team members, develop, monitor and revise strategic plans, including performance and quality improvement (PQI) and risk management activities.
- Lead consumer advocacy activities; communicate strategic plans to staff, engaging them in the successful attainment of strategic goals
- Support and encourage leadership team members in their responsibilities related to programs and operations; identify and guide in the resolution of problems
- Assure confidentiality of client and other organizational information as established by the Board of Directors, standards of the Council of Accreditation (COA) and National Foundation for Credit Counseling (NFCC)
- Ensure that COA and NFCC codes of ethics are upheld -wide
- Maintain harmonious working relationships with Board of Directors, staff, and local funders, business associates, and community collaborative partners
- Assure that financial activities are carried out in a fiscally responsible manner. Prepare annual budget in conjunction with the Board of Directors' Finance and Audit Committee

Accomplishments

- Reorganized service delivery to expand the number and variety of client services
- Updated and strengthened policies and procedures
- Created ongoing program for management and staff professional and leadership development
- Significantly improved financial stability, including:
    - doubled agency's annual budget

    - increased financial reserves
    - a 2012 external assessment said the agency's financial management "exceeded standards . . . they could teach classes about financial management for nonprofits."
- Revised CQI strategic objectives and tools to monitor and evaluate service delivery impact on client family financial stability
- Restructured senior management team
- Enhanced staff morale, recruitment and retention, productivity and performance thru effective communication, implementation of inclusive strategic planning process and expanded staff training and development
- Revised marketing and public relations efforts, resulting in expansion of collaborative service delivery activities in response to community needs
- Updated computer MIS system to meet IT current and future needs
- Successfully completed COA reaccreditation requirements (2003, 2007, 2014 underway)
- While President of Credit Counseling Agencies of North Carolina Association, worked with NC Attorney General's Office, NC Commissioner of Banks and consumer protection organizations to successfully revise the NC Statute on Debt Adjusting (2005 and 2007)
- Led the 2012 renaming and subsequent rebranding of the agency
- 2013-14 restructure of the organization from four program-based areas to three technical divisions

1987 - 2002 **EXECUTIVE DIRECTOR**
Consumer Credit Counseling Service of Western North Carolina, Inc.,
Asheville, North Carolina

Nature of Business: Community based financial education and counseling service

Responsibilities: Very similar to FPP responsibilities, within context of smaller organization

Accomplishments

- Successful integration of Strategic Plan with annual budget, including three-year budget projections addressing program expansion, satellite location long-term funding sustainability, and operating reserve
- Development of an Employee Assisted Housing program for a regional hospital system (5,000 employees), to help with employee retention and recruitment
- Secured grant funding ($150,000 over 3 years) for organizational and program development, including program and satellite location cost analysis tool
- Working with audit firm, developed comprehensive program, and 11satellite office, cost per unit analytical tool, using an inter-active Excel spreadsheet format
- Lead consumer advocacy activities;
- Converted, and periodically upgraded computer MIS system
- Successfully completed requirements for initial accreditation and subsequent reaccreditation by Council on Accreditation (1998 and 2002)

1984 - 1986 **EXECUTIVE DIRECTOR**
National Health Association, Inc., Tampa, Florida

EARLIER EMPLOYMENT

1981 - 84 **PRINCIPAL ACCOUNTANT**
Office of the State Comptroller, State of Connecticut, Hartford

1980 - 1981 **DIRECTOR OF FISCAL SERVICES**
United Social and Mental Health Services, Inc., Danielson, Connecticut

1974 - 1980 **ACCOUNTANT II**
Business Office, Central Connecticut State University, New Britain, Connecticut

EDUCATION

M.A., PUBLIC AFFAIRS/NON-PROFIT MANAGEMENT, 1996, Western Carolina U., Cullowhee, NC

GRADUATE ACCOUNTING AND BUSINESS COURSES, 1976 - 1984, Central Connecticut State Univ.

B.A., ADMINISTRATIVE SCIENCE, 1974, Central Connecticut State University

Certified Community Mediator and Arbitrator

Leadership Winston-Salem: 2006 Graduate

PAST AND PRESENT PROFESSIONAL AND COMMUNITY AFFILIATIONS

Buncombe County United Way: Board Member
Coalition of NC Consumer Advocate Organizations: Member; Informal Co-Chair
Council on Accreditation (COA): Certified Peer Reviewer/Team Leader
Credit Counseling Agencies Association of North Carolina: President
Kernersville Lions Club: Member
National Foundation for Credit Counseling (NFCC): Operating Committee Member
NFCC/COA Task Force Review of Accreditation Standards: Volunteer
North Carolina Council on Economic Education: Board Member
Reinvestment Partners: Board President; Executive Committee Member
Winston Salem Reynolda Rotary Club: Member
United Way Executive Association: Executive Committee Member
Credit Building Alliance: Member
North Carolina Asset Alliance: Member
Winston Salem Chamber of Commerce: Member
Winston-Salem/Forsyth County Asset Building Coalition: Founding Co-Chair,