



# REQUEST FOR PROPOSALS

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Audit Services and PSC Annual Reporting Services

Village of Theresa, Wisconsin

## 1. Introduction

The Village of Theresa (“Village”) is requesting proposals from qualified firms to provide:

1. Annual independent audit services, and
2. Public Service Commission (PSC) annual reporting services

for the Village’s financial operations, including utility operations.

The Village intends to enter into a multi-year agreement beginning with the fiscal year ending December 31, 2026.

## 2. Background

The Village of Theresa is a Wisconsin municipality that maintains:

- General governmental operations
- Utility operations (water and sewer)

The Village utilizes Caselle municipal accounting software for financial management.

The Village prepares financial records in accordance with applicable standards and seeks professional services to ensure compliance with:

- Generally Accepted Accounting Principles (GAAP)
- Wisconsin Department of Revenue requirements
- Wisconsin Public Service Commission reporting requirements

## 3. Scope of Services

A. Audit Services



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- Perform annual financial audit in accordance with GAAS and Government Auditing Standards (if applicable)
- Issue Auditor's Report and Financial Statements
- Provide adjusting entries and communications
- Provide information for SL-003, Department of Revenue Municipal Financial Report
- Present results to the Village Board, if requested

## B. PSC Annual Reporting Services

- Prepare and file PSC annual reports
- Ensure compliance with PSC requirements
- Provide utility accounting guidance

## C. Optional Services

- Rate case assistance
- Financial consulting
- Capital planning support
- Grant reporting assistance

## **4. Proposal Requirements**

### A. Firm Information

### B. Qualifications

### C. Approach

### D. References (minimum of 3 municipal clients)

### E. Fee Proposal (audit, PSC, hourly rates, multi-year pricing)



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## 5. Term of Agreement

The Village anticipates awarding a three (3) to five (5) year contract, subject to annual review and appropriation.

## 6. Proposal Submission

Proposals must be submitted no later than June 30, 2026.

Becky Tellier, Clerk-Treasurer

Village of Theresa

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Late submissions may not be considered.

## 7. Selection Criteria

- Experience with municipalities
- Qualifications
- Understanding of scope
- Cost
- References

The Village reserves the right to reject proposals or request additional information.

## 8. Additional Information

The Village will provide access to financial records and prior audit reports upon request.