

**From:** [Alix, Shaun M. \(SAO\)](#)  
**To:** [Spilka, Karen \(SEN\)](#)  
**Cc:** [Hurley, Michael \(SEN\)](#); [Goncalves, Lisa M \(SAO\)](#)  
**Subject:** OSA Audit  
**Date:** Monday, January 6, 2025 3:14:49 PM  
**Attachments:** [Senate Doc Request 1.6.25.docx](#)  
[Engagement Letter Senate and House January 2025 - Final.pdf](#)

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Dear President Spilka,

Please see attached for our preliminary request for documents. I've also attached the engagement letter that was sent on January 3<sup>rd</sup>, 2025.

Thank you,

Shaun Alix  
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Please note my email has recently changed. My new address is now [Shaun.Alix@MassAuditor.Gov](mailto:Shaun.Alix@MassAuditor.Gov). Please update your records accordingly and direct all future emails to my new address.

January 6, 2025

Senator Karen E. Spilka, Senate President  
24 Beacon Street, Room 332  
Boston, MA 02133

Dear President Spilka:

Pursuant to our audit, which we notified you of on January 3, 2025 (please see attached), we request the following documents be provided to us within 72 hours, consistent with Section 12 of Chapter 11 of the Massachusetts General Laws:

1. The official budgets for the Senate for Fiscal Years 2021, 2022, 2023 and 2024.
2. Copies of official audits of the Senate for Fiscal Years 2021, 2022, 2023 and 2024.
3. A listing of all transactions related to the Senate's balance forward line item for Fiscal Years 2021, 2022, 2023 and 2024.
4. A listing of all monetary settlement agreements<sup>1</sup> entered into by the Senate with any current or former employees or members of the Senate during Fiscal Years 2021, 2022, 2023 and 2024.

We anticipate requesting other documents in the coming days related to this audit and will provide you those requests in writing.

Please provide these documents to me at [Shaun.Alix@massauditor.gov](mailto:Shaun.Alix@massauditor.gov). Should you have any questions, please do not hesitate to contact me for further clarification.

Sincerely,

Shaun Alix  
Audit Manager

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<sup>1</sup> Monetary settlement agreements are as defined by the Office of the Comptroller at <https://public.powerdms.com/MAComptroller/documents/1779893>