



The Commonwealth of Massachusetts
Office of the Comptroller
One Ashburton Place, Room 901
Boston, Massachusetts 02108

THOMAS G. SHACK III
COMPTROLLER

PHONE (617) 727-5000
FAX (617) 727-2163
INTERNET: <http://www.mass.gov/osc>

June 15, 2015

Honorable Karen Spilka, Chair
Senate Committee on Ways and Means
State House – Room 212
Boston, MA 02133

Honorable Brian S. Dempsey, Chair
House Committee on Ways and Means
State House – Room 243
Boston, MA 02133

Dear Chairwoman Spilka and Chairman Dempsey:

Attached is the report required in legislation, section 12 of Chapter 19 of the Acts of 2015, An Act Relative to State Personnel (ERIP).

As required in section 4, the final day to file an application for the ERIP was Friday, June 12, 2015, and through the rules of the state board of retirement the deadline was midnight if filing electronically.

The state retirement board provided 2,659 applicants from applications reviewed through noon today. This data was the basis for the required report. The report contains 20 applicant records that need further analysis to confirm compliance with the stated inclusion requirements. Please note that there are two tabs within the report. The first provides the data required by the legislation. The second tab is a summary of the data.

The effective date of retirement is June 30, 2015. Because prospective retirees may withdraw or opt-out of the ERIP until that date, we have redacted the individual titles and salaries.

Also, the state board of retirement has indicated that there are less than 50 applications in-house remaining to review and forward to my office. There is also the possibility that additional applications sent through the U.S.P.S. would be accepted if properly postmarked. When the final records are received and processed by the state retirement board this office will update the section 12 report.

I have also included a data sheet for reference. Please let me know if you have any questions or need anything further.

Sincerely,

Thomas G. Shack III, Esq.
Comptroller of the Commonwealth

[Attachment](#)

cc: Karen Spilka, Chair, Senate Committee on Ways and Means
Brian S. Dempsey, Chair, House Committee on Ways and Means
Adriana Campos, Budget Director, Senate Ways and Means Committee
Kathryn Kendall, Budget Director, House Ways and Means Committee
Kristen Lepore, Secretary, Executive Office for Administration and Finance
Martha Walsh, Assistant Secretary, Administration and Finance
Paul Dietl, Chief Human Resources Officer
Kathy Sheppard, Deputy Comptroller

Data Sheet:

As required the report contains an estimate of the amounts of accrued vacation time, unused sick leave and other accrued benefit, if any, for each employee as of the June 30, 2015 date of retirement. The balances are based on the last payroll run, pay period ending May 30, 2015. Therefore individual balances could decrease if available time is used during the month of June (June has 22 business days).

The report today contains 20 applicant records that need further analysis to confirm compliance with the stated inclusion requirements.

Data Requested:

- (i) the item of appropriation that funds the position - Column A
- (ii) the name of the agency, bureau, department, office or division of the executive department that is funded by the item - Columns B, C and D - Secretariat, Department Code and Department
- (iii) the classification title of the position – Column E – Title (Provided June 30, 2015)
- (iv) the salary range for the title and the salary payable to the person who retired from the position (provided June 30, 2015) - Columns F, G, and H - Minimum, Maximum, Yearly Salary
Minimum and maximum from applicable salary chart
- (v) the retirement date for the person who retired or will retire from the position – Column O - per legislation, section 4, all required to be June 30, 2015
- (vi) the amounts of accrued vacation time, unused sick leave or other accrued benefit for each employee as of the employee's date of retirement:
 - i. Sick Amount (full) – Column I
 - ii. Vacation Amount – Column J
 - iii. Sick Leave Payout Amount @ retirement – Column L
 - iv. Professional Leave Amount – Column K
 - v. Buyout Amount* – Column M
 - vi. Compensatory Time Amount** – Column N

*Buyout amount payable in thirds over 3 fiscal years, per section 8 – September 1, 2015 (FY16); July 1, 2016 (FY17); and July 1, 2017 (FY18).

** Where applicable the amount of compensatory time is included. These amounts are due and payable at the time of retirement, June 30, 2015, fiscal year 2015.