

## **Illinois Attorney General's Charitable Advisory Council**

### **Meeting Minutes**

June 25, 2025

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### **Meeting Minutes**

A meeting of the Charitable Advisory Council was held on Wednesday, June 25, 2025, at 10:00 a.m. via Zoom. In total, 14 individuals attended the meeting.

#### **PRESENT:**

Byram Fager, Southern Illinois Community Foundation  
Donna Davis, University of Illinois Foundation  
Dr Jennifer Mosley, UChicago Obama Foundation Scholars Program  
Emily Friedman, John D. & Catherine T. MacArthur Foundation  
Erica Spangler Raz, Spangler Raz Law & Consulting, Global Philanthropy Partnerships  
Graham Grady, Lloyd A. Fry Foundation / Taft  
Jodi Patt, C3 Legal  
Julianne Buck, Community Foundation of Grundy County  
Maria Pesqueira, Healthy Communities Foundation  
Patricia H. Lee, Loyola Law School Business Law Clinic  
Whitney Wade, Chicago Foundation for Women

In addition, the following staff members from the Illinois Attorney General's Office were present:

Nathalina Hudson, Kristin Louis, Theresa Geary

Others in attendance include:

None

Members not in attendance:

Dr Euan Hague, DePaul University

#### **I. Welcoming and Introductions**

Nathalina Hudson, Chief of Staff, Illinois Attorney General's Office, opened the meeting at 10:04 a.m. thanking members for their service.

**II. Approval of Minutes of Previous Meeting Minutes**

Held for the next meeting. No vote occurred.

**III. Mission of the Charitable Advisory Council and Goals for 2025**

**The Role of the Charitable Trust Bureau in Protecting and Preserving Charitable Assets**

Kristin Louis, Bureau Chief, Charitable Trust provided an explanation of the Bureau and its mission of preserving and protecting charitable assets. The people of the State of Illinois are the ultimate beneficiaries of charitable assets and protecting a donor's intent and ensuring charitable assets are used appropriately are among the Attorney General's most fundamental, long-established duties. Kristin provided information on the compliance work and investigations undertaken by the bureau to meet these goals.

Kristin Louis highlighted the work of the CAC and provided a recap of previous initiatives from the CAC. The last full committee meeting was in 2016 and last Executive Committee (EC) meeting in 2021. This is the time to reorganize and review the work of the CAC to better utilize the council to reach charitable organizations.

The CAC is to become a mission-driven taskforce focusing on providing educational opportunities and to better interface with charities across the sector regardless of size of the organization. Membership should reflect geographic diversity and individual or organizational mission to match this education goal.

Kristin Louis shared that the hope is for members to advise the Attorney General's Office on developments within the sector, what are they seeing in their work across the state, and to help share governance best practices and respond to other issues facing charities.

Kristin Louis suggested perhaps meetings could be discussion focuses or have guest speakers providing educational presentations. The plan is for virtual meetings, perhaps annually but more often to begin or as necessary. Members would provide input on when and what to meet on.

Members introduced themselves.

A discussion was held on possible topics for assisting charitable organizations and issues facing the sector. Topics suggested including online or digitalization of filings to ease compliance, reviewing what other states do in terms of filings (i.e. bi-annual filings); educational outreach to understand filings and to assist with compliance; modernizing funding restrictions; providing resources on the OAG website; responding to requests for information from the federal government and congress; updating the resources and checklists for new organizations; reviewing the filing requirements for Articles of Incorporation; educating individuals looking to start a new nonprofit on fiscal sponsorship opportunities versus creating a new 501c3; and cyber security.

**IV. Spotlight: Online Filing and Public Access System**

Kristin Louis provided a demonstration and overview of the new Online Filing and Public Access System. The goal is for this system to go live over the summer to provide an online filing system for charities. Currently there are approximately 38,000 registered organizations

submitting filings via paper and there are approximately 250 new registrations per month. Previously individuals mailed in paper checks and had to provide written signatures. The new system functions include the ability for new and existing organizations to register, re-register, and file annual reports completely online; request extensions and letters of good standing; provide electronic signatures and payments; and communicate via email with registered organizations. In addition, an updated web-based charitable database will launch with real time updates as staff processes registrations and online reports.

Kristin Louis provided a demonstration of the new portal webpages including creating an online account, registration for new organization, filing annual reports and uploading supporting documents, process for electronic signatures, and payment options.

**V. Member Discussion on Outreach and Rollout of the New Online System**

Kristin Louis and Theresa Geary shared that the request is for the council to recommend training and assist with outreach to organizations about these new developments. There will be press release, FAQs and other resources to come on the Attorney General's website. The request was made that if members hear of issues when organization use the new system, please share feedback with our office to ensure we can resolve any issues.

Due to time, further discussion was held for the next meeting.

Nathalina Hudson shared that this portal should be unveiled the end of July. In addition, she shared that the Attorney General's Office wants to draw on members' expertise and ideas to make this committee collaborative.

**VI. Schedule of Meetings**

While the goal is to meet annually, Theresa Geary shared that due to the launch there may need to be a meeting sooner, perhaps August - October, after the portal goes live to work on education and outreach.

Theresa Geary shared the timeline is that July will be spent finalizing the portal, then will reach out about the next meeting after that, conduct outreach and education in the fall in advance of the next major filing deadline of December 31, 2025.

Theresa Geary shared that she would email meeting date options due to several members having to log off as the meeting went long.

Byram Fager shared that meeting more frequently than annually is helpful or having smaller committee or breakout meetings perhaps 3-4 times a year to maintain momentum.

**VII. Public Comment**

Theresa Geary asked for public comment.

There was no public comment.

**VIII. Adjournment**

Meeting adjourned at 11:25 a.m.