

Illinois Attorney General's Charitable Advisory Council

Meeting Minutes

February 23, 2026

Please click the link below to join the webinar:

<https://ilattorneygeneral-gov.zoom.us/j/85605770934?pwd=B5Mb5duC2x7suaZ7Ef0y53QS69rC28.1>
Passcode:wG.Y4&7C

Call In Instructions (if needed):

Dial: 1-312-626-6799

Webinar ID: 856 0577 0934

Passcode: 74660652

Meeting Minutes

A meeting of the Charitable Advisory Council was held on Monday, February 23, 2026, at 10:00 a.m. via Zoom. In total, 15 individuals attended the meeting.

PRESENT:

Byram Fager, Southern Illinois Community Foundation
Donna Davis, University of Illinois Foundation
Dr Euan Hague, DePaul University
Dr Jennifer Mosley, UChicago Obama Foundation Scholars Program (joined later in meeting)
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
Julianne Buck, Community Foundation of Grundy County
Maria Pesqueira, Healthy Communities Foundation
Patricia H. Lee, Loyola Law School Business Law Clinic
Whitney Wade, John D. & Catherine T. MacArthur Foundation
Jodi Patt, C3 Legal

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

Kristin Louis, Theresa Geary, and William Lowry

Members not in attendance:

none

I. Welcoming and Introductions

Theresa Geary, Illinois Attorney General's Office, opened the meeting at 10:01 a.m. thanking individuals for joining and conducting a roll call.

II. Approval of Minutes from November 3, 2025

Theresa Geary asked members to review the minutes from the meeting on November 3, 2025.

Donna Davis moved to approve the minutes, and Euan Hague seconded. A voice vote occurred with all members voting in favor of approving the minutes except for Emily Friedman who abstained. There were no objections.

III. Presentation: Federal Litigation Updates for the Charitable Sector

William “Bill” Lowry, Assistant Attorney General, Civil Rights Bureau and a member of the Federal Accountability Team provided a presentation on federal litigation actions and the impact on the non-profit sector. The presentation included an overview of the work of the Illinois Attorney General’s Office on advancing the public interest and protecting the rule of law. As of January, more than 50 lawsuits have been filed. Individuals can learn more about these cases and find updates at <https://ilgaction.quorum.us/federalcases/>.

In response to this presentation, the board suggested a presentation, possibly from Forefront, on Lobbying.

IV. Updates from the OAG Charitable Trust Bureau

Kristin Louis, Bureau Chief, Charitable Trust provided an update on the launch of the online filing system and the December 31, 2025, filing deadline.

The online filing system is fully live for charitable organization forms; however, updates are continuing to resolve technical issues related to the calculation of fees. The goal is to rectify these issues by the June 30th deadline.

In January, the professional fundraiser and consultant and solicitor forms went live.

As of last Friday, there are 4,718 active portal users. The highest filing day occurred on December 5th. Staff have noticed many weekend filings, which was one of the goals of the online system.

The approval rate for online filing continued to improve. Of the 7,977 online filings, approximately 88% were approved and 11.5% were rejected. The common issues causing rejected filings were filers selecting the wrong answer in the screening questions and issues with uploading the correct documents. Approval for online filings generally occurs within 24 hours but as the number of online filings increases the approval timelines may increase.

The office continues to accept and process paper filings. Of the 18,973 paper filings, approximately 77.5% were approved and 22.5% rejected. Paper filings do take longer to process, and staff are still processing paper filings including extension requests.

However, the online system has allowed staff to better track approval rates and provide data.

The feedback continues to be generally positive, and Kristin highlighted that the online extension process is working well.

The Illinois Attorney General's Office continues to advertise online filing and the new system through website updates (including videos and power points), press and social media posts, mailing postcards to upcoming filers, and conducting in-person or virtual training.

Theresa Geary highlighted that the next webinar hosted by the office will be April 17th.

To access online resources such as the videos and past webinar slide decks please visit <https://illinoisattorneygeneral.gov/consumer-protection/charities/>.

Kristin Louis offered to attend other events if organizations are interested in a presentation.

Members asked questions regarding commercial co-venture and group filings.

V. **Schedule of Meetings**

Theresa Geary suggested scheduling the meeting dates for the remainder of the year. After a brief discussion, the following meeting dates were selected:

May 11, 2026, at 10 a.m.

July 13, 2026, at 10 a.m.

October 26, 2026, at 10 a.m.

The May 11th meeting will feature a presentation from Kristin Louis on gift restrictions. Future meeting topics will be determined at the next meeting.

Theresa Geary will send calendar invite for these dates with links to follow closer to the meeting dates.

Members requested that the meeting link and documents be added to the calendar invite as well as sent via email.

Information such as public meeting notices can be found online at <https://illinoisattorneygeneral.gov/About/Public-Meetings-Announcements/Charitable-Advisory-Council/>.

Julie Buck reminded individuals to complete the Open Meetings Act Training.

VI. **Public Comment**

Theresa Geary asked for public comment.

There was no public comment.

VII. **Adjournment**

Euan Hague mentioned to adjourn the meeting and Erica Spangler Raz seconded the motion. All members voted to adjourn the meeting. Meeting adjourned at 11:31 a.m.