Illinois Attorney General's Charitable Advisory Council

Meeting Minutes

July 13, 2026

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Meeting Minutes

A meeting of the Charitable Advisory Council was held on Monday, July 13, 2026, at 10:00 a.m. via Zoom. In total, 12 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
Erica Spangler Raz, Spangler Raz Law & Consulting, Greater Good Charities
Julianne Buck, Community Foundation of Grundy County
Maria Pesqueira, Healthy Communities Foundation
Patricia H. Lee, Loyola Law School Business Law Clinic (joined during meeting)
Whitney Wade, John D. & Catherine T. MacArthur Foundation (joined during meeting)

In addition, the following staff members from the Illinois Attorney General's Office were present:
Kristin Louis and Theresa Geary

In addition, Elizabeth Schulter attended with Donna Davis.

Members not in attendance:
Emily Friedman, John D. & Catherine T. MacArthur Foundation
Graham Grady, Lloyd A. Fry Foundation / Taft
Jodi Patt, C3 Legal

I. Welcoming and Introductions

Theresa Geary, Illinois Attorney General's Office, opened the meeting at 10:03 a.m. thanking individuals for joining and conducting a roll call.

II. Approval of Minutes from May 11, 2026 Meeting

Theresa Geary asked members to review the minutes from the meeting on May 11, 2026.

Maria Pesqueira moved to approve the minutes, and Donna Davis seconded. A voice vote occurred with all members voting in favor of approving the minutes. There were no objections.

III. Updates from the OAG Charitable Trust Bureau

Kristin Louis, Bureau Chief, Charitable Trust provided an update on the rollout of the online filing system.

As of June 30, 2026, there were 10,040 active portal users, an increase of approximately 3,000 users from the last meeting report in May. The highest filing day occurred on June 29th with 670 filings.

Since the portal went live in August 2025, 23,591 online filings received with an acceptance rate of over 90%. Approximately 9.65% of filings were rejected.

Common system issues include incorrect dates or wrong responses to the screening questions and an incorrect calculation of fees. Staff are continuing to modify language to help clarify the screening questions to limit incorrect responses and working with the developer on the fee calculation issue.

Approval for online filings generally occurs within 48 hours but as the number of online filings increases the approval timelines may increase.

Staff processed 33,832 paper filings into the new system. Please note this number may include some paper filings from prior to the system go live date due to the processing backlog. Of these paper filings, approximately 77% were approved and 22% were rejected.

The feedback continues to be generally positive, and staff are pleased that more than 90% of online filings approved. There is a continued effort to make the portal user friendly including the plan to add a button to escalate issues to staff without calling. These efforts are in process.

The Illinois Attorney General's Office continues to advertise online filing and the new system through webinars and are considering hosting an additional webinar this fall. Kristin has also presented at various state and local conferences and events including bar events and with CPAs.

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.

If there are issues with the portal, please contact OAG compliance staff for assistance.

IV. Discussion: Resources for new and existing Nonprofit Organizations and updating the OAG webpage

Theresa Geary explained the current OAG website includes resources from the CAC and provided a history of that educational support. However, that page is out of date (https://illinoisattorneygeneral.gov/Consumer-Protection/Charities/Building-Better-Charities/resources-for-charities/).

A discussion was held sharing various issues and concerns from nonprofits and how the CAC may be able to share or develop additional resources to assist both new and existing organizations. In addition, members shared suggestions on how to make the page user friendly. A sample website option was shared that would provide drop downs by topic to help users. Members appreciated this option.

Members requested that OAG front line staff answering the main phone number share what they are seeing and the categories of questions that may help inform the CAC's efforts to compile resources. That could create a FAQ or other main topic for the drop down options on the website followed by specific topics from the CAC.

Patricia Lee flagged that there is a need for statewide or resources outside of the Chicagoland area especially to support rural communities.

Topics suggested:

- Frequently Asked Questions
- Referrals
  - Include Geographic Area of Resources (statewide, local, rural)
  - Community Foundation of East Central Illinois Nonprofit Excellence website has resources including a map with links
  - Alliance of Illinois Community Foundation Website – locator map
- Creating a new nonprofit organization
- Bylaws
- Ongoing Compliance with Filings
  - Include in this section (or somewhere) a handout for organizations to track important dates such as their annual filing deadline
- Operational Issues
  - Remote work considerations
  - Navigating leadership transition
  - Resources for addressing complaints
  - Information for organizations operating in multiple states
  - Changing tax or nonprofit classification
- Best Practices and the Forefront Resource Book
- Dissolution of Organizations
  - With assets
  - Without assets
- Resources for staff
- Resources for volunteers and members of the public

V. Discussion on Next Meeting Topic

A discussion on ideas for the next meeting topic was held and request for topic and presentation from members or a guest speaker.

Members requested including time at the next meeting to share more about their work and the services they can provide to help other members make referrals and work together.

A suggestion was made to have a meeting regarding data on the nonprofits in Illinois, perhaps a presentation from the NIU. Maria Pesqueira shared that she can provide to provide data on the impact of cuts and other federal policies.

Other topics mentioned included audits and panels with brainstorming from members on navigating topics.

The next meeting will be held via zoom on October 26, 2026, at 10a.

VI. **Public Comment**

Theresa Geary asked for public comment.

There was no public comment.

VII. Adjournment

Euan Hague mentioned to adjourn the meeting and Byram Fager seconded the motion. All members voted to adjourn the meeting. Meeting adjourned at 11:15 a.m.