



2026 Annual Report

September 2025 – August 2026



Our Key Numbers

11 English Language Homebuyer Classes
1 Spanish Language Homebuyer Class
200 Students
85% Low-to-Moderate Income Students

1 Mortgage Lender Class
1 Real Estate Professional Class
66 1-on-1 counseling sessions



Our Accomplishments

The core of our work is helping people navigate the path to homeownership through free homebuyer education and counseling. Over the past year we offered monthly free homebuyer education classes, including a Spanish language session to serve our Spanish speaking community members and expand our efforts to reduce language barriers for homebuyers. Our classes, paired with our free HUD-certified one-on-one counseling, helped many low-to-moderate income households qualify for down payment assistance and other homebuying support from the City of Madison, Dane County, and other agencies.

We trained lenders and real estate professionals, equipping them to challenge common misconceptions about who can qualify for homeownership and to better connect and guide clients toward the many programs that can make buying a home more affordable and within reach.

Our outreach and marketing efforts included social media campaigns, printed materials, and participation in community events to increase awareness of our services. At our members' meetings, guest speakers highlighted strategies for expanding access to affordable housing, and members shared resources and strengthened professional connections.

A new collaboration with Urban League of Greater Madison, which now oversees our HUD-certified classes and counseling, has expanded our reach and strengthened our ability to connect more homebuyers with accessible education, counseling, and resources.

As an adjunct to our core commitment of education, we provided several \$500 down payment assistance grants to qualified home buyers, offering an additional boost to families working toward homeownership.

We are grateful to our sponsors, whose support made all this possible. Our dedicated volunteers contributed their time and expertise to teaching and managing the operations of HBRT — demonstrating extraordinary commitment to expanding homeownership opportunities in our community.

Our Mission

The Home Buyers Round Table of Dane County is a collaboration of housing industry representatives that promotes homeownership through education and counseling to low and moderate-income families. We believe homeownership will increase family stability and financial security; stabilize and strengthen communities and neighborhoods; and generate jobs and stimulate economic growth.

Our History

HBRT began in 1997 as a brainstorming session led by Peg Thomas of UW Extension to identify barriers to homeownership in Dane County. What started as a conversation quickly evolved into a collaborative movement, engaging community members, housing professionals, and local organizations.

By 1999, HBRT hosted its first Homeownership Fair and adopted its mission statement. The organization incorporated in 2000 and secured 501(c)(3) nonprofit status in 2002.

Over the years, HBRT's focus has shifted from large public fairs to targeted education, training, and programming—ensuring we meet the evolving needs of homebuyers. Key milestones include:

- Launching specialized lender and real estate agent down payment assistance training.
- Introducing Spanish-language homebuyer education classes and providing interpretation services when requested.
- Expanding partnerships to deliver education in trusted community spaces.
- Providing direct support through initiatives such as the \$500 Down Payment and Closing Cost Assistance Grant.

Today, HBRT continues to grow its impact through innovative programs, strong community partnerships, and a steadfast commitment to making homeownership a reality for more families in Dane County.



Our Education Classes

Homebuyer Education

Our monthly HUD-certified classes prepare individuals and families for successful homeownership. Each class provides comprehensive guidance on the homebuying process, including sessions on financial readiness, obtaining a mortgage, working with a real estate agent, downpayment assistance programs, home inspections, and insurance. Paired with our free HUD-certified one-on-one counseling, these classes open the door to down payment assistance programs for qualified families.

To expand access to communities across Dane County we offered classes in multiple locations:

- The Urban League HUB, 2352 South Park Street, Madison
- Southwest Madison Employment Center, 1233 McKenna Boulevard, Madison
- Sunshine Place, 1610 West Main Street, Sun Prairie
- The Atrium at Villager Mall, 2300 South Park Street, Madison
- Centro, 2403 Cypress Way, Madison

In 2026 we began partnering with The Urban League of Greater Madison, a HUD-certified Housing Counseling Agency, transitioning from our previous partnership with Consumer Credit Counseling Services.

Lender and Real Estate Agent Education

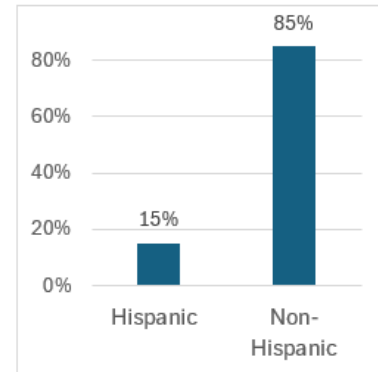
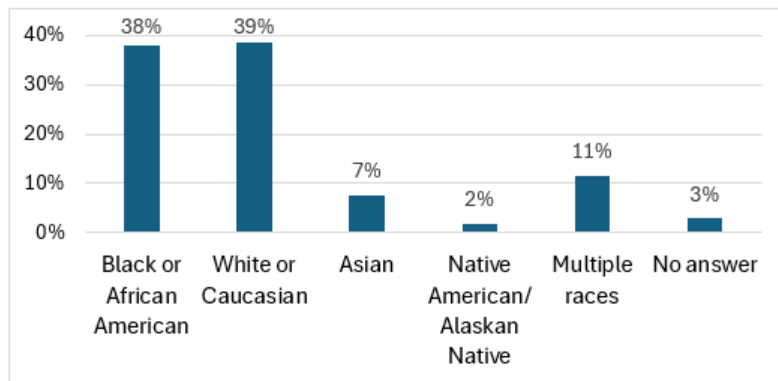
In addition to our Homebuyer Education classes, we provided training for mortgage lenders and real estate agents. In 2026 we encouraged both groups to attend both the lender and agent sessions to ensure more comprehensive understanding of available programs and best practices.

Key Numbers

- 11 English language classes
- 1 Spanish language class – March, 2026
- 200 students at our Homebuyer Education Classes
- 66 students received one-on-one counseling
- 85% of students have low-to-moderate income
- 1 Lender class with 27 mortgage professionals
- 1 Real Estate Agent class with 11 real estate professionals

Demographics

Class attendees, September 2025 – August 2026:





Our Marketing and Outreach

Marketing & Referrals

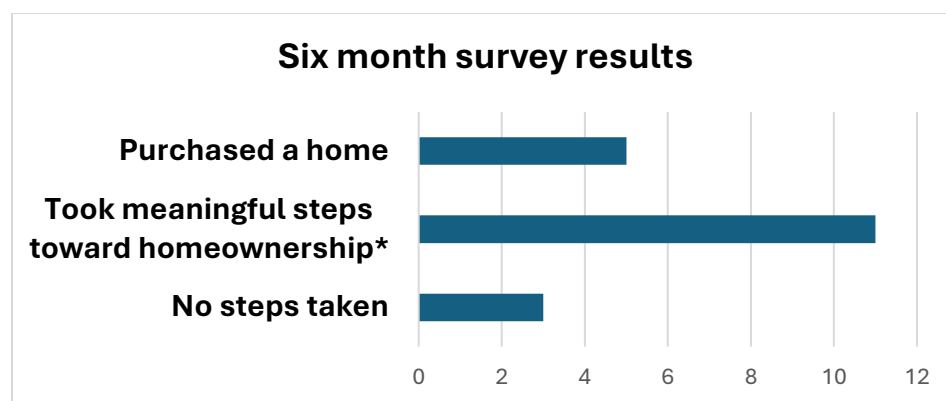
HBRT promoted its homebuyer education classes through a variety of marketing channels, including brochures, class-specific flyers, online listings on our website, and social media. We continue to receive strong referral support from lenders, real estate agents, government agencies, and community organizations, who direct many prospective homebuyers to our classes.

Community Presence

HBRT participated in six community events across Dane County, offering information on homebuyer education and available down payment assistance resources. These events strengthened our visibility and helped connect residents with tools to begin or advance their homeownership journey.

Participant Follow-Up & Impact Measurement

To better understand long-term outcomes, HBRT launched a six-month follow-up survey for homebuyer education participants. This survey tracks progress toward homeownership and provides valuable insights into participant needs, barriers, and success over time.



*Such as creating a spending plan, saving for a down payment, meeting with a lender, or contacting a real estate agent

Our Members' Meetings

Our goal is to provide members with valuable professional development opportunities, spaces to build relationships, and avenues to actively participate in advancing HBRT's mission.

Membership Engagement

Throughout the year, we offered timely and relevant presentations reflecting the evolving dynamics of the regional homeownership market.

These events provided members with both industry insights and networking opportunities.

Date	Topic
9/11/2025	Annual overview and board of director election results of HBRT
10/9/2025	Urban League of Greater Madison homeownership program <i>Speaker: Jamal Mosley, Urban League of Greater Madison</i>
11/13/2025	Habitat for Humanity financial and homebuyer education programs <i>Speaker: Maya Egan-Robertson, Habitat for Humanity</i>
12/11/2025	Housing Quality Standards Inspections <i>Speaker: Doug Dalsing, Testudo LLC</i>
1/8/2026	Own It – Building Black Wealth <i>Speaker: Tiffany Malone, Own It</i>
1/27/2026	Celebration and Social Hour, Liberty Station
2/12/2026	Legislation impacting housing <i>Speaker: Robert Proter, WRA Government Affairs</i>
3/12/2026	Panel discussion on housing trends and affordability <i>Speakers: Laura Stanfield, Wintrust Mortgage; Gina Newell, eXp Realty; Sara Whitley, Johnson Financial Group; Jake Johnson, REAL Broker</i>
4/9/2026	Overcoming Housing Discrimination <i>Speaker: Isabella Devine, Fair Housing Center of Greater Madison</i>
5/14/2026	City of Madison and Dane County assistance programs <i>Speakers: Rebecca Wiese, Movin' Out, and Caleb Odorfer, Dane County</i>
6/11/2026	City of Janesville housing programs <i>Speaker: Ana Boden, City of Janesville</i>
7/9/2026	Summer Happy Hour Social, Olbrich Biergarten



Our Committees

Education Committee: Laura Stanfield, Gina Newell, Cheri Hjerstedt, Deaken Boggs

Marketing Committee: Brittany Daniels, Michelle Yanes, Jake Johnson, Paul Lyon

Membership Committee: Connie Hilla, Monica Gonzalez, Sarah Storgaard

Outreach Committee: Maria Davila-Martinez, Craig Eyers, Becky Binz, Karen Bassler, and Sarah Headly

Sponsorship Committee: Daniel Piazza, Torey Schauff, Dan Easley

Our Board

Dan Easley, Easley Services LLC, HBRT President

Paola Paulino, Summit Credit Union, HBRT President Elect

Maria Davila-Martinez, City of Madison, HBRT Past President

Michelle Yanes, Habitat for Humanity, HBRT Secretary

Monica Gonzalez, Bank of Sun Prairie, HBRT Treasurer

Becky Binz, City of Sun Prairie

Caleb Odorfer, Dane County

Connie Hilla, Coldwell Banker Real Estate Group

Deaken Boggs, Madison Area Community Land Trust, (began on HBRT board 12/11/2025)

Jake Johnson, REAL Broker

Karen Bassler, Movin' Out (ended on HBRT board 12/1/2025)

Laura Stanfield, Wintrust Mortgage

Our Teachers

These people taught our Homebuyers Education classes from September 2025 through August 2026. Without these volunteers our classes would not be possible.

Bex Laird, Goosehead Insurance

Cheri Hjerstedt, Mode Realty Network

Connie Hilla, Coldwell Banker Real Estate Group

Dan Easley, Easley Services LLC

Daniel Piazza, American Family Insurance

Doug Dalsing, Testudo LLC

Gina Newell, eXp Realty

Jake Johnson, REAL Broker

Laura Stanfield, Wintrust Mortgage

Monica Gonzalez, Bank of Sun Prairie

Rina Courtier, Landmark Credit Union

Sara Whitley, Johnson Financial Group

Susan Detering, Solidarity Realty

Tyler Riekema, Country Financial

Our Sponsors

We are deeply grateful to our sponsors, whose support makes our work possible.

\$15,000 Grant



Major Sponsors - \$2,500 annually



Mid-Level Sponsors - \$1,000 annually



Friend Sponsors - \$300 annually

Buckshot General Contracting

Coldwell Banker Real Estate

**Daniel Piazza Agency,
American Family Insurance**

Easley Services LLC

Great Midwest Bank

Homestead Title

Landmark Credit Union

Mallory Rodriguez State Farm Agency

Marine Credit Union

Park Bank

REAL Broker

**REALTORS® Association of South
Central Wisconsin**

Solidarity Realty

Testudo LLC