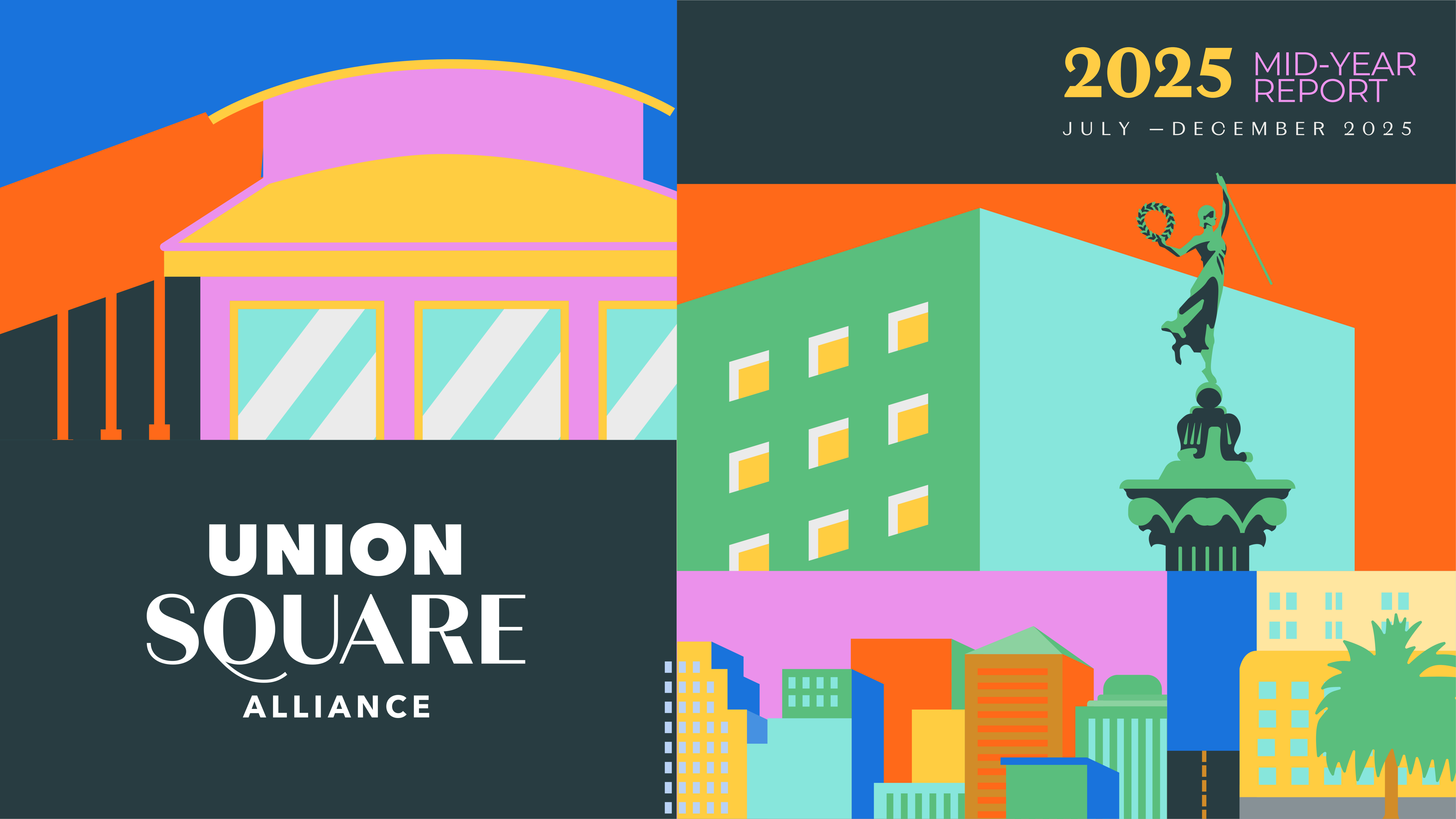


2025 MID-YEAR  
REPORT

JULY — DECEMBER 2025

# UNION SQUARE

ALLIANCE





# Letter from CEO & Board President

The Union Square Alliance proudly shares this mid-year report, highlighting significant achievements and financial milestones from July to December 2025.

Union Square’s complete revitalization is clearly on the horizon, and with every passing year, the Alliance brings the district’s dreams for a full resurgence closer to reality with each launch of a new, multi-month public activation, global business reinvestment, and traditions old and new, made during the magical Holidays in Union Square.

In the past six months, the momentum behind a number of public realm projects has remained strong. Plans for the Powell Street Improvement Project, a key infrastructure initiative designed to enhance safety, accessibility, and the visitor experience, are well underway. The project is transitioning into the construction documentation phase, with construction scheduled to begin in November 2026, and is receiving strong support and prioritization from Mayor Lurie and respective City departments. Bringing together local businesses, streetscaping, and public art activations, Powell Street is set to become a cultural epicenter for all to enjoy. Alongside other revitalization projects, the Powell Street corridor will serve as a focal point for this iconic destination, offering a diverse array of experiences for all to enjoy.

Bringing live music back to Union Square has been a central theme of our district’s efforts during this time period. Work on the Union Square Stage Improvement Project continues with full force, with aims of completion in the spring of 2026, which will transform the plaza into a vibrant hub for music, celebration, and shared memories that bring the community together.

This quarter we launched the Afternoons on Maiden Lane program, inviting pedestrians to pause and rediscover the charm of Maiden Lane through engaging, hands-on activities, such as scrapbooking, charm bracelet-making, cultural celebrations, and line dancing, presented in collaboration with local organizations.

The community is truly on the rise, as reflected by a well-attended holiday season. During Holidays in Union Square, our district transformed into a festive wonderland filled with magic, featuring attractions such as the Safeway Holiday Ice Rink Presented by Kaiser Permanente, The Powell Street Sled at the Cable Car Turnaround Arts, and the ever-vibrant Winter Walk Presented by JPMorganChase on Stockton Street. This pedestrian plaza once again showcased the Holiday Marketplace this year presented by Gap Inc. – alongside food trucks, and live performances. The event was made extra special by VIP event co-host, NBA Champion-turned TV host Festus Ezeli, as well as appearances from Nintendo’s Mario and Princess Peach, and Violet, the proud mascot of the Valkyries. Union Square proved once again to be the beating heart of the city, especially during the holiday season: drawing residents, workers, and visitors alike to celebrate new traditions, and to create new, cherished memories with loved ones.

“Like somebody turned a faucet on,” press have remarked about Union Square’s resurgence. In the last six months, 18 new businesses have opened in Union Square. In October, we welcomed the grand opening of Michael Minna’s newest restaurant expansion, Bourbon Steak in the Westin St. Francis, alongside celebrity Warriors NBA Champion Stephen Curry’s new speakeasy, The Eighth Rule. With Nintendo’s addition earlier last year, Pop MART—the home of the infamous Labubu—also joining the district, and the anticipated return of Uniqlo, Union Square is further cementing its global appeal.

With these remarkable developments in 2025, Union Square has firmly established itself as more than a destination — it is at the heart of San Francisco’s resurgence.

The Union Square Alliance extends sincere gratitude to our Board members, community, and to everyone who shares our vision. Together, we have the opportunity to create something enduring, preserving the district’s cultural essence while embracing innovation, and ensuring a vibrant, thriving future for Union Square and its community for generations to come.

## Services We Provide

The Union Square Alliance provides the following services: Clean and Safe Services, Public Realm & Streetscape Improvements, District Marketing & Events, and Advocacy. Between July 2024 and June 2025, the Union Square Alliance implemented and continued the following programs:



Clean  
and Safe  
Services



Public Realm  
& Streetscape  
Improvements

District  
Marketing &  
Events



Advocacy





# Services Updates

## RFP 230 Grant

In November 2024, the Alliance was awarded a \$1.9 million grant to launch a safety and outreach program, which ran through September of 2025. The grant was extended until the end of the year, with an additional \$550,000 added to continue the safety ambassador program and add welcome ambassadors through March 2026.

## Cleaning & Maintenance

From July through December 2025, the Union Square Alliance's Clean and Safe Services team delivered measurable impact across the district. Our Service Ambassadors removed almost 200,000 pounds of trash, addressed 5,800 instances of hazardous waste, including biohazards, and removed 3,300 graffiti tags. An impressive 850,000 linear feet of district block-fronts were professionally pressure washed as well. These numbers show the scale and impact of our team's collective efforts to keep our streets clean.

## Cameras

The district's camera network continued to play a critical role in incident response and coordination with law enforcement and other partners. Once official, our camera network was directly integrated with the San Francisco Police Department's Real Time Investigations Center, enhancing SFPD's investigative capabilities and contributing to improved case clearance rates. Although no additional cameras were installed during this period, the Alliance maintained a robust system of 537 cameras. This network supported 155 video footage requests, aiding investigations, clarifying incident details, and enhancing accountability. Together, these efforts underscore the Alliance's ongoing commitment to a safe and accountable Union Square district.





# Cleaning Stats



Pounds of trash removed

196,800



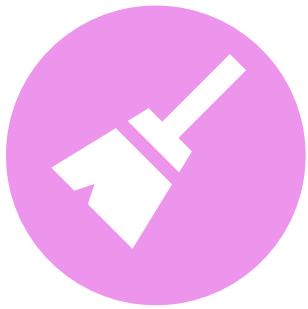
Hazardous waste removed

5,767



Graffiti tags removed

2,934



Cleaning requests received

4,319



Ft. of Block fronts pressure washed

863,800

(including pressure washing grant)



Overflowing trash cans addressed

1,354



# Safety Stats



Quality of life incidents addressed (safety + Baseline ambassadors)

5,812



Hospitality Encounters

11,273



Video footage requests

155



Incidents addressed by Legion

8,093



Total number of cameras

537



# District Marketing & Events

## Social Media Stats

Alliance social media has gathered 1.7M impressions in the last 6 months, with social media followers (shown below) continuing to grow and engage.



29,400



75,000



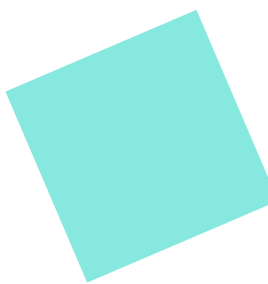
4,570



1,200



2,000



## Union Square In Bloom

The “Union Square in Bloom” campaign was celebrated through the end of August, with a continuation of our local businesses’ floral installations and the Blooms & Bubbles Bar Crawl and Bloomie Awards, both Presented by Lyft. The Bar Crawl led participants on a tour of our district to visit five bars highlighting their Bloom cocktails, with each bar activating with live entertainment to keep the party going. Lyft generously provided riders with \$5 off their rides from the beginning of their sponsorship until the end of August. The Bloomie Awards were hosted at The Marker hotel, to honor another successful year of Bloom and to award the winners of each Bloom category.

## Winter Walk

Union Square’s signature holiday event, Winter Walk, returned to San Francisco from December 13 - 24. Presented by JPMorganChase and supported by the San Francisco Office of Economic and Workforce Development and the Office of Mayor Daniel Lurie, this event brought an array of live music, interactive activations, holiday decor, a curated holiday market, and delicious food and drink offerings. The event was made extra special by VIP event co-host Festus Ezeli, as well as appearances from Nintendo’s Mario and Princess Peach, beloved characters from the Featured Sponsor. Winter Walk continues to grow: this year we welcomed new additions including the Old Navy pop-up, and the JPMorganChase “Ambition in the Air” interactive experience.

## The Ornament Trail

Thanks to a generous sponsorship from LendingClub, this year’s Ornament Trail was bigger, brighter, and more immersive than ever. We expanded the program with additional ornaments along Powell Street and suspended displays on street poles throughout the district.

Partnering with three local artists and debuting a new Mario ornament hosted at the Westin St. Francis hotel, our Ornament Trail guides led visitors to eleven, larger-than-life holiday ornaments that turned the streets into an open-air gallery. More than 2,000 participants followed the trail to discover each piece and received a festive prize at the end.



## Public Art Installations & Activations

In late July, the Alliance partnered with LeMonde Studios to install four rotating public art installations over a six-month period to create a vibrant, welcoming environment and to enhance the visual appeal of the district’s most iconic locations. In conjunction with these installations, themed weekend arts and cultural activations were hosted at the turnaround, including live mariachi performances and free marigolds for Dia de Los Muertos, and other seasonal art workshops, celebrating San Francisco’s cultural diversity. This program was made possible with support from Mayor Daniel Lurie’s office and the SF Office of Economic and Workforce Development.

## Maiden Lane Pilot Program

With funding from the Office of Economic and Workforce Development, we launched new activations on the east block of historic Maiden Lane to increase foot traffic and support local businesses, coining the program as “Afternoons On Maiden Lane”. Programming was organized into a rotating series, featuring music accompanied by interactive experiences such as live music and art workshops. Since the launch of the program, we have received positive feedback from participants; what was previously a low-traffic area is now an attraction, which in turn highlights the local businesses around Maiden Lane. Placing additional tables and chairs also offers workers an outdoor location for their lunch breaks, increasing foot traffic throughout the week.





# Public Realm & Capital Improvement Projects

## Landscaping & Planters

Over the last six months, our team took great care to oversee and maintain district-wide landscaping to ensure all planters were clean, well-maintained, and visually presentable, with ongoing care to support plant health. Seasonal flower baskets were refreshed in preparation for the holiday period.

### Hallidie Plaza

We enhanced the landscaping in Hallidie Plaza through the installation of fresh mulch and thoughtful banner and wayfinding placements. To cultivate a festive atmosphere throughout the district, we introduced illuminated floral décor for the Bloom activation, which later transitioned to light-up snowflakes at both Maiden Lane and Hallidie Plaza.

### Powell Street Improvement Project

In partnership with landscape architecture firm Field Operations and the City of San Francisco, the Alliance supported the Powell Street Improvement Project through property owner engagement, community meetings, and guidance on fundraising and project management. The project remains on schedule, with construction anticipated to begin at the end of 2026.



## Union Square Sound Improvement Project

To support the transformation of Union Square into a world-class entertainment destination, the Alliance collaborated with the Office of Economic and Workforce Development (OEWD), the Recreation and Parks Department, architect Yann Paoli, and sound producer David Zieses to design and permit a state-of-the-art sound system for the plaza. All necessary permits have been secured, and installation is on track for spring 2026.

## Union Square Stage Backdrop

During the holiday season we coordinated the installation of the “Holidays in Union Square, San Francisco” sign on the Union Square Stage, enhancing the visual landscape and creating a high-impact photo opportunity for visitors.

## Maiden Lane Improvement Project

In collaboration with DPW and the Planning Department, the Alliance hosted three workshops with stakeholders, property owners, and local businesses to re-envision Maiden Lane’s full potential. High-quality renderings and a preliminary budget were developed, which will support future fundraising efforts when the project advances.





# Public Affairs & Advocacy

## 1 New PAC Chair

In August, the Union Square Alliance welcomed Brian Fenwick, General Manager of the Marker Hotel, as the new chair of the Public Affairs Committee. A committed advocate for San Francisco and Union Square’s recovery, Brian has actively engaged in identifying strategies to strengthen the district and support economic development.

## 2 Marketing & Economic Development Summit

The Marketing and Economic Development Summit, held at the San Francisco Marriott Union Square, brought together Ned Segal, Chief of Housing and Economic Development from the Mayor’s Office, Ali McEvoy, Maven Retail Partner, and the Union Square Alliance to discuss marketing tools, event amplification and district-wide campaigns, as well as insights on Union Square’s retail landscape, recent market developments, emerging trends, and future capital projects shaping the district’s recovery and growth.

## 3 Letter of Support- SB 395- San Francisco Downtown Hospitality Zone

SB 395, authored by Senator Scott Wiener, authorizes the City and County of San Francisco to issue up to 20 new, non-transferable liquor licenses for food and beverage establishments located within the designated downtown hospitality zone. Recognizing the bill as an important tool to support nightlife and advance economic recovery, the Union Square Alliance submitted a formal letter of support. SB 395 was enacted in October 2025.

## 4 Holiday Public Safety Press Conference

Leading up to the holidays, the Union Square Alliance, the Mayor’s Office, SF District Attorney Brooke Jenkins, BART PD, and SFPD proudly gathered in Union Square Plaza for the annual press conference on public safety. Highlighting the 40% drop in crime rates in Union Square and a 30% decrease citywide, this initiative was a celebration of our district achievements, and has become a tradition focused on creating a secure and enjoyable shopping environment during the festive season.

## 5 DDC Funding

Since the establishment of the Downtown Development Corporation (DDC), a nonprofit organization created to attract private investment in support of downtown recovery, the Union Square Alliance has been engaged with DDC leadership to underscore the critical importance of cleanliness, safety, and key capital projects such as the Powell Street Improvement Project. The Alliance is grateful for the DDC’s financial support for Winter Walk 2025, and looks forward to continuing to partner with the organization in the coming years.

## 6 Macy’s Tree

On behalf of the Union Square Foundation, the Alliance sought to secure sponsorship for the Macy’s Great Tree in Union Square Plaza. In partnership with Macy’s, the Alliance identified potential sponsors, ultimately with San Francisco civic leader Chris Larsen stepping up, generously offering Ripple as the Presenting Sponsor. In 2025, the iconic Christmas tree was named the “Macy’s Great Tree Presented by Ripple.”





# Financial Report

## Statement of Financial Position

AS OF DECEMBER 31, 2025

ASSETS	
Cash	\$4,320,992
Receivables (Net)	\$1,540,412
Prepays & Deposits	\$120,772
Right of Use Asset (Office Space)	\$1,182,160
Fixed Assets (Net)	\$139,329
Total Assets	\$7,303,665
LIABILITIES & NET ASSETS	
LIABILITIES	
Accounts Payable & Accrued Expenses	\$3,105,648
Line of Credit and Loans Payable	\$126,688
Deferred Revenue	\$21,823
Lease Payable (Office Space)	\$1,214,279
Total Liabilities	\$4,468,439
NET ASSETS	
Restricted Net Assets	\$9,244
Unrestricted Net Assets	\$2,825,983
Total Net Assets	\$2,835,227
TOTAL LIABILITIES & NET ASSETS	\$7,303,665

## Budget Comparison · Assessment & Core Operations

ASSESSMENT & CORE OPERATIONS

REVENUE & CARRY OVER	ACTUAL RESULTS	% TOTAL	BUDGET	% TOTAL	VARIANCE
Carry Over Used From Fiscal Year 24-25	\$2,097,752		\$2,097,752		
Assessment Income	\$4,013,816	86%	\$4,001,816	88%	\$12,000
Other	\$655,964	14%	\$548,639	12%	\$107,325
TOTAL INCOME	\$4,669,780	100%	\$4,550,455	100%	\$119,325

EXPENSES	ACTUAL RESULTS	% OF ASSESSMENT	BUDGET	% OF ASSESSMENT	VARIANCE
Clean & Safe	\$3,050,606	69%	\$2,870,646	67%	\$(179,960)
Public Realm, Marketing, Events & Advocacy	\$845,304	19%	\$906,126	21%	\$60,822
Management & Administration	\$511,984	12%	\$480,120	11%	\$(31,864)
Total Assessment Expenses	\$4,407,894	100%	\$4,256,892	100%	\$(151,002)
NET SURPLUS (DEFICIT)	\$261,886		\$293,563		\$(31,677)

These statements are interim and have not been audited, reviewed or compiled by a CPA. They are the representation of the financial status of the operation according to the Union Square Alliance management.

For questions on the financial reports please contact Benjamin Horne, CFO at [ben@unionsquarealliance.com](mailto:ben@unionsquarealliance.com).



Budget Comparison · Total Results

TOTAL RESULTS (INCLUDING GRANTS & OTHER FUNDS)

REVENUE & CARRY OVER	ACTUAL RESULTS	%	BUDGET	%	VARIANCE
Carry Over Used From Fiscal Year 24-25FY	\$2,553,342		\$2,553,342		
Assessment Income	\$4,013,816	59%	\$4,001,816	57%	\$12,000
Other Income	\$2,738,438	41%	\$2,972,364	43%	\$(233,926)
TOTAL INCOME	\$6,752,254	100%	\$6,974,180	100%	\$(221,926)

EXPENSES	ACTUAL RESULTS	% OF EXPENSES	BUDGET	% OF EXPENSES	VARIANCE
Clean & Safe	\$3,952,822	61%	\$4,193,021	63%	\$240,199
Public Realm, Marketing, Events & Advocacy	\$1,915,667	30%	\$1,945,986	29%	\$30,319
Management & Administration	\$601,876	9%	\$560,010	8%	\$(41,866)
Total Assessment Expenses	\$6,470,365	100%	\$6,699,017	100%	\$228,652
NET SURPLUS (SURPLUS)	\$281,889		\$275,163		\$6,726

Budget January - June 2026 & Forecast 25-26FY

REVENUE & CARRY OVER	BUDGET JAN-JUN 26	FORECAST 25-26FY	% OF ALL REVENUE
Reserves (Carry Over) from Dec ‘25	\$2,835,227	\$2,553,342	
Assessment Income*	\$3,262,969	\$7,276,785	56%
Other Income	\$3,080,652	\$5,819,090	44%
TOTAL REVENUE	\$6,273,117	\$13,095,875	100%

EXPENSES	BUDGET JAN-JUN 26	FORECAST 25-26FY	% OF EXPENSES
Clean & Safe	\$4,347,838	\$8,300,660	63%
Public Realm, Marketing, Events, & Advocacy	\$1,601,946	\$3,517,613	27%
Management & Administration	\$658,694	\$1,260,570	10%
TOTAL EXPENSES	\$6,608,478	\$13,078,844	100%
Net Surplus (Deficit)	\$(290,920)	\$17,031	
Projected Reserves (Carry Over) 6/30/26		\$2,570,369	

To fund operations from July - October 2026





# Our Partners, Board Members & Staff

## Union Square Alliance Staff

<b>Marisa Rodríguez</b> Chief Executive Officer	<b>Melanie Medina</b> Executive Assistant	<b>Marlenne Mendoza</b> Project Coordinator
<b>Benjamin Horne</b> Chief Financial Officer	<b>Zarrina Yousufzai</b> Finance & HR Associate	<b>Ryan Santamaria</b> Intern
<b>Daniela Vasile</b> Chief Operating Officer	<b>Eva Schouten</b> Public Realm & Events Manager	
<b>Ken Rich</b> Director of Economic Development & Policy	<b>Hollie Chiao</b> Marketing & Communications Associate	
<b>Jalil Turner</b> Director of Services	<b>Liza Bernard</b> Events Associate	

## Board Members

BOARD OFFICERS	ADVISORY COMMITTEE CHAIRS	
<b>Mark Purdy</b> President <i>Managing Director   Asset Management Grosvenor – Property Americas</i>	<b>Mark Sullivan</b> Marketing Committee Chair	<b>James Sangiacomo</b> Finance Committee Chair <i>Principal   Trinity Properties</i>
<b>Don R. Thomas</b> Vice President <i>Board Vice President   Club Donatello</i>	<b>Manuela Anne King</b> Streetscapes & Public Realm Committee Chair <i>President   RHAALandscapeArchitects</i>	<b>Don R. Thomas</b> Services & Public Safety Committee Chair <i>Board Vice President   Club Donatello</i>
<b>Stephen Brett</b> Secretary <i>Principal   Brett&amp;Company</i>	<b>Brian Fenwick</b> Public Affairs Committee Chair <i>Managing Director   The Marker Hotel</i>	
<b>Julie Taylor</b> Treasurer Executive Vice President- Retail Services Group  Colliers International	<b>Russell D. Keil, Jr.</b> Audit Committee Chair <i>Principal   The Keil Companies</i>	

# Our Partners, Board Members & Staff

## Board Members

BOARD OF DIRECTORS		
<b>David Lewin</b> <i>General Manager Grand Hyatt San Francisco</i>	<b>Kevin Flanagan</b> <i>General Manager, Recology Golden Gate</i>	<b>Spencer Sechler</b> <i>Vice President of Business Development ACE Parking</i>
<b>Mark Sullivan</b> <i>Marketing Committee Chair</i>	<b>MaxineA.Papadakis, MD</b> 150 Powell HOA	<b>Lauren Ellis</b> <i>Gallery Director CK Contemporary</i>
<b>Stephen Brett</b> <i>Principal Brett &amp; Company</i>	<b>Mark Purdy</b> Managing Director   Asset Management Grosvenor	<b>Clifton Clark</b> <i>Area General Manager The Westin St. Francis</i>
<b>Jordan Buckley</b> <i>Director of Hotel Operations Paramount Hotels, Inc.</i>	<b>James Sangiacomo</b> <i>Principal Trinity Properties</i>	<b>Opio Dupree</b> <i>VP, Government and PublicAffairs Macy’s Inc.</i>
<b>Erik Murray</b> <i>Oak Investment Funds Managing Partner</i>	<b>Julie Taylor</b> <i>Executive VP Collier's International</i>	<b>Peter Hart</b> <i>Complex General Manager Hilton SF Union Square &amp; Parc 55 San Francisco</i>
<b>Shirley Howard-Johnson</b> <i>Global Arts Consultant</i>	<b>Don R. Thomas</b> <i>President and CEO, The Club Donatello</i>	<b>Brian Fenwick</b> <i>Managing Director The Marker Hotel</i>
<b>Evan J. Kaizer</b> <i>President&amp;CEO Sieroty Company Inc.</i>	<b>Wes Tyler</b> <i>General Manager Chancellor Hotel on Union Square</i>	<b>J. Timothy Falvey</b> Hanford Freund & Company
<b>Russell D. Keil, Jr.</b> <i>Principal The Keil Companies</i>	<b>Manuela Anne King</b> <i>Streetscapes&amp;Public Realm Committee Chair   President RHAA Landscape Architects</i>	



Union Square Alliance Subcontractors

Allbay Landscaping

Applied Video Solutions (AVS)

Bartram Partnerships

Bigbelly

Block by Block

SF Holiday Lighting

Cube 84

David Perry and Associates, Inc.

IDEAS

Impact Lighting

Field Operations

Field Paoli

Legion Security

Lightcast.io

Marbled Mint

Michael Hruska

Professional Computer Support

Progress Public Affairs

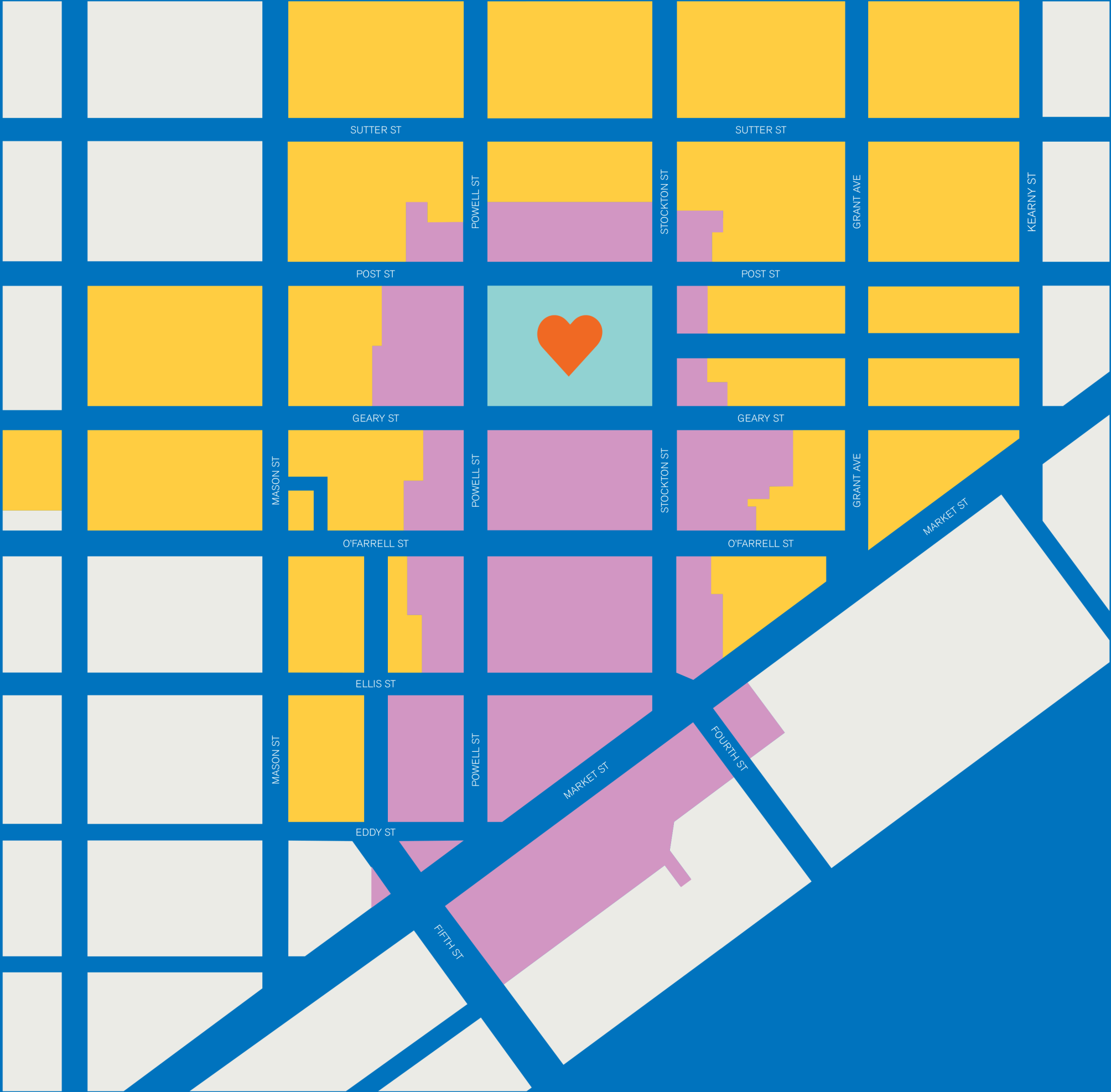
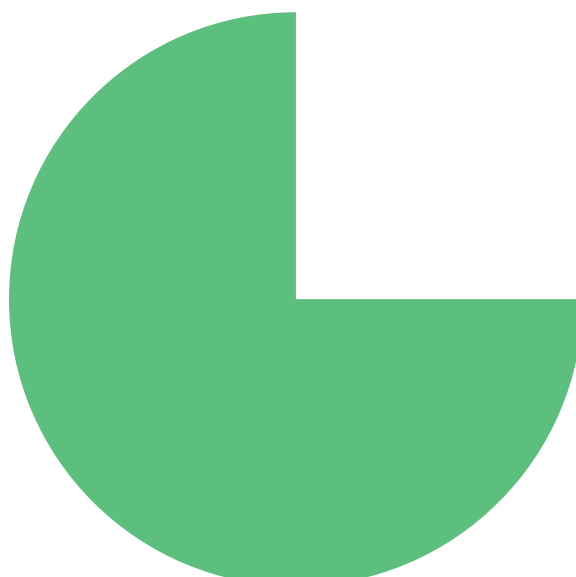
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San Francisco, CA 94102