



c/o Calvary Community Center
4740 Baltimore Avenue
Philadelphia, PA
19143

Future of the Neighborhood

A survey of Cedar Park neighbors
about zoning, development and
diversity in our community

TABLE OF CONTENTS

OVERVIEW	2
CEDAR PARK NEIGHBORS AND THE CEDAR PARK NEIGHBORHOOD	3
CHANGING DEMOGRAPHICS	7
SURVEY METHODOLOGY	9
KEY FINDINGS	11
DETAILED REPORT ON FINDINGS	14
SURVEY INSTRUMENT	35



OVERVIEW

Over 500 Cedar Park residents completed a survey in the summer of 2012, which solicited opinions about the future of the Cedar Park neighborhood. There was wide agreement from survey respondents on many important topics. Almost universally, there was excitement about increased vitality of the Baltimore Avenue commercial corridor, the decreasing number of blighted/vacant properties and the sense of community that residents feel here.

Sense of community, access to public transit, walkability, bikeability, green space, architectural character, affordability, and racial & economic diversity are the top reasons that Cedar Park residents choose to live in the neighborhood.

On matters of zoning, residents want to see more growth and amenities along commercially zoned areas of the neighborhood, and a majority of respondents preferred that new commercial development be led by local business owners. Most neighbors desire future development that is compatible with the character and style of existing architecture. Respondents did not provide a clear consensus on the need for more rental apartments versus increased single and multi-family home ownership.

Top concerns about the future of the neighborhood were crime/safety, blight/trash and the perception that Cedar Park is becoming less affordable. Respondents also conveyed a strong desire for additional and diverse amenities, which aligns with the Cedar Park Neighbors (CPN)-sponsored 2010 Baltimore Avenue Conversation.

Many residents shared similar opinions about the future of the neighborhood, which means there are many opportunities for Cedar Park residents to come together and collectively define a vision for the future that maintains the unique and diverse character of the neighborhood, while continuing to grow.

CEDAR PARK NEIGHBORS AND THE CEDAR PARK NEIGHBORHOOD

Cedar Park is a neighborhood in the University City section of West Philadelphia. The neighborhood is bounded by Larchwood Avenue to the north and Kingsessing Avenue to the south, 46th street to the east and 52nd street to the west following the eastern boundary of the railroad to 49th Street at Kingsessing Avenue.

Cedar Park Neighbors (CPN) is a 501(c)3 organization, formed by a concerned group of residents in or around 1960, and today represents an association of diverse households and businesses. The association's purpose is to foster collaboration among all those living and working in the neighborhood, to promote community development, to provide a forum for communication and community education, to respond to neighborhood concerns, and to advocate for and promote the general welfare of the Cedar Park community.

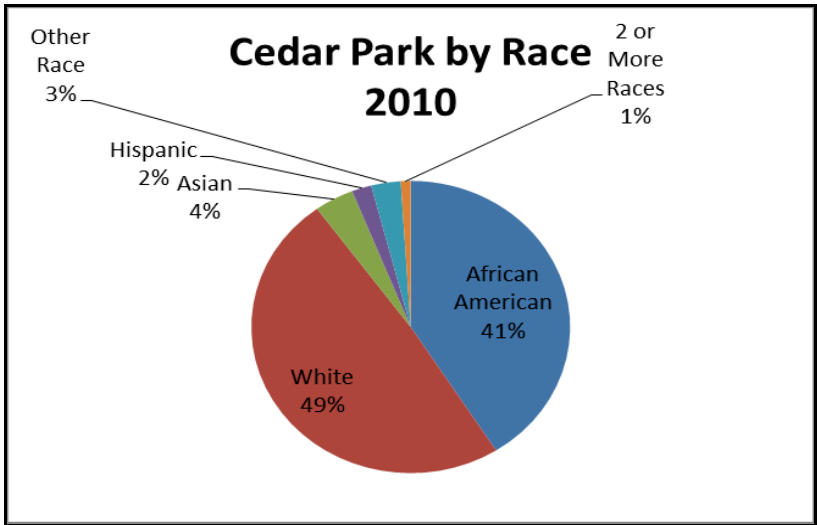
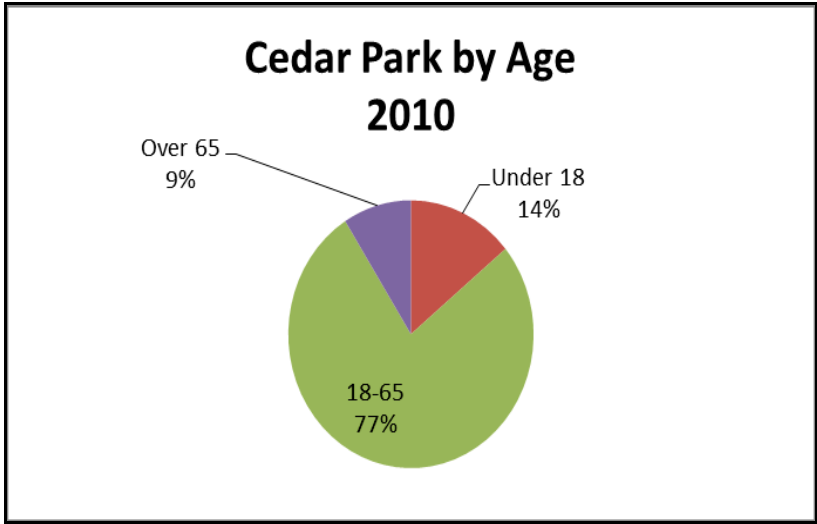
For almost fifty years, CPN has represented residents' interest to political leaders and municipal agencies on matters of zoning, crime and safety, community development, education, city code enforcement, liquor control issues, sanitation issues and other matters of concern to area residents. CPN is a voluntary, dues-paying association of residents and businesses, reflecting the racial, ethnic, socio-economic and religious diversity of our community.

To provide a context in which to examine the survey findings presented in this report, we felt it important to provide information about differences in property values, property composition, and types of housing across the neighborhood. Unless otherwise noted, data cited in this report describing Cedar Park demographics, types of housing, and related changes over the last ten years come from The Reinvestment Fund's Policy Map. Much of this information is derived from public sources like the US Census, the FBI, the IRS, HHS and HMDA.¹

According to the 2010 US Census, 77% of Cedar Park residents were between the ages of 18 and 64, 9% were over the age of 65, and 14% under 18. Five percent of all residents were under the age of 5. Forty-nine percent of residents were White, 42% were African American, 5% were Asian, 2% were Hispanic, 3% were of some other race and 1% were two or more races.²

¹ Numbers represent data within block groups and census tracts that are either within or touch Cedar Park. As a result, numbers may reflect a slightly larger geographic area than the Cedar Park neighborhood. Values presented were calculated by summing the census block groups contained therein. Block groups were included if more than 50% of their area was included in the Cedar Park area.

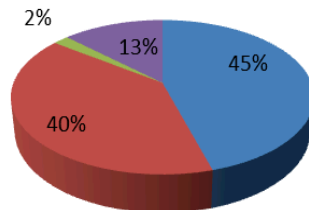
² GIS. PolicyMap. The Reinvestment Fund, n.d. Web. 06 Mar. 2013.



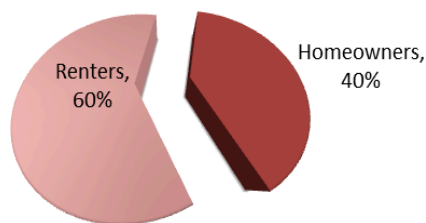
According to the 2010 US Census, 8,618 people resided in the Cedar Park neighborhood in a total of 3,724 households. Forty percent of residents owned their homes while 60% rented. Forty-five percent of housing in the area was made up of single-family homes, 40% included units in small apartment buildings, 2% included units in large apartment buildings, and 13% included two unit homes and duplexes. Twenty percent of all housing was vacant in 2010.

Types of Housing in Cedar Park 2010

■ Single Family Homes ■ Units in Small Apt. Bldgs.
■ Units in Large Apt. Bldgs. ■ Two Unit Homes and Duplexes



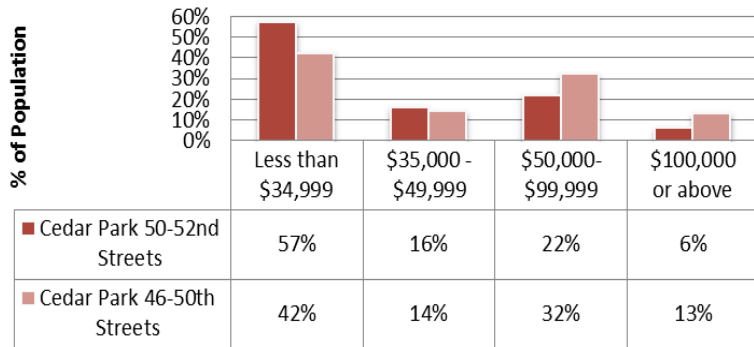
2010 Cedar Park Homeowners vs. Renters



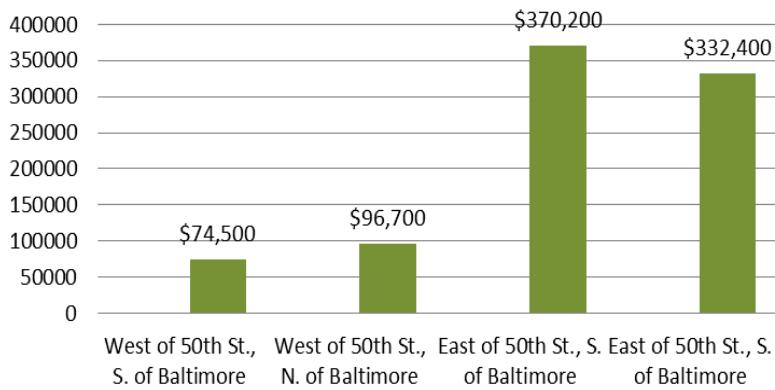
Data related specifically to annual household income show wide variation in the neighborhood. Median household incomes in 2010 ranged from \$18,393 to \$72,292.

When traveling east to west property values and household incomes begin to trend lower at 50th Street. Racial characteristics also shift when traveling east to west, with a greater percentage of African Americans west of 50th and more Whites east of 50th Street.

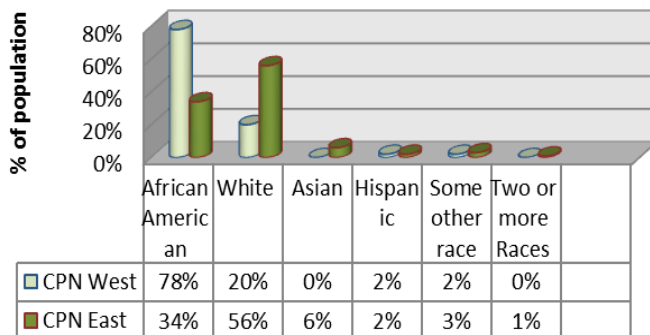
Cedar Park by Income 2010



2010 Cedar Park Median Home Values



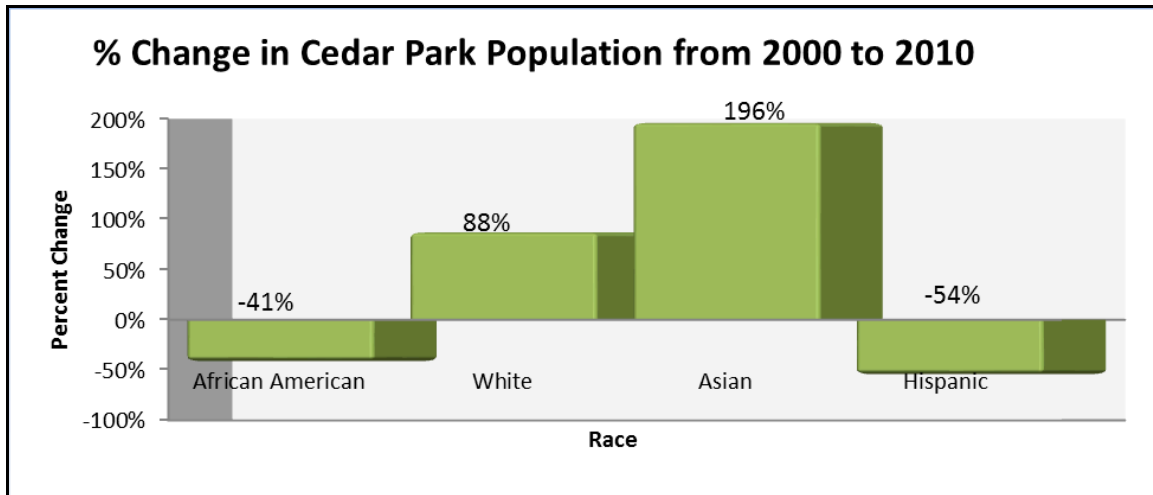
2010 Racial Makeup of CPN East and West of 50th Street



CHANGING DEMOGRAPHICS

In the compilation and analysis of survey responses, it is important to provide context about the demographic make-up of the neighborhood as well as key indicators to the economic health of the neighborhood such as median income and property values.

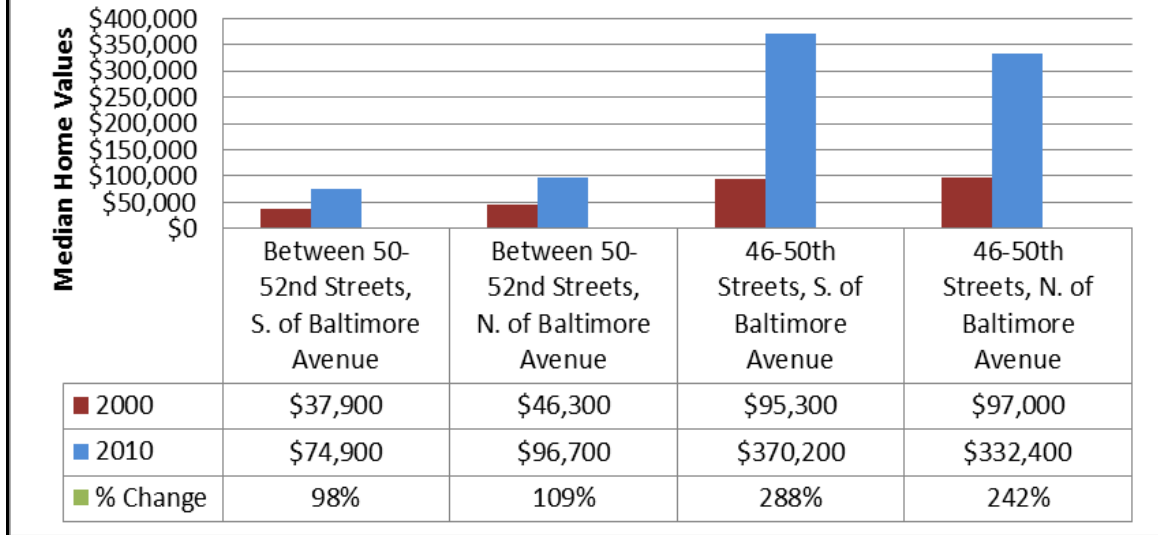
Between the 2000 and 2010 US Census, the white population within Cedar Park increased by 88%, and the Asian population increased by 196%, while the African American population dropped by 35%. The most dramatic demographic shift occurred in the area to the west of 50th Street, where the White population increased by 391% compared to a 75% increase observed to the east. Other changes were relatively consistent with the changes in Cedar Park overall, with the exception of an increase in the Asian population of 283% to the east.



While incomes overall have increased in the area, they too have shifted differentially. In the census tracts west of 50th Street, median family incomes increased by no more than 19% between 2000 and 2010. By contrast, in the area south of Baltimore Avenue between 46th and 50th Streets, median family incomes nearly doubled.

Home values show a similar trend. While median home values increased overall, the change was more dramatic in the areas to the east of 50th Street, where home values increased by as much as 288% between 2000 and 2010.

Changes in CPN Median Home Values between 2000 and 2010



The economic shift within the neighborhood generates questions about affordability, but there are parallel benefits of increasing property values for existing homeowners. CPN’s role in issues of zoning, land use, parking, and education has some influence on the quality of life and affordability for all current and future residents. While there is some concern about the rate of change, especially as rents have gone up and some residents will face property tax bills that they can’t afford. CPN is frequently asked by its members to respond to these kinds of concerns.

SURVEY METHODOLOGY

As part of a city-wide Phila2035 planning effort, the Philadelphia City Planning Commission asked CPN and other local organizations to participate in the community plan for Southwest Philadelphia and University City. CPN created a neighborhood survey to determine resident's desires and concerns regarding development. The results, along with other community feedback such as the Baltimore Avenue Conversation, provide CPN with a basis to best represent the interests of as many Cedar Park residents as possible.

The survey was created jointly by CPN board members Ray Murphy and David Hinchler, with input from Maureen Tate, Monica Alison, Algernong Allen and members of the CPN Zoning committee. Respondents were not required to respond to all survey questions and survey content included questions related to zoning, development and diversity in the Cedar Park neighborhood. A copy of the survey instrument is provided at the end of this report.

Approximately 40 paper surveys were distributed at a CPN membership meeting held in May 2012, which was publicly advertised. In June 2012, an electronic version of the survey was sent to approximately 240 members of the CPN email list and a link was posted to the CPN Facebook group page. Individual board members also forwarded the email announcing the survey to their own personal networks.

Paper versions of the survey were distributed at Dollar Days (a street festival on Baltimore Avenue) in July and August 2012. Cedar Park block captains were asked via email to distribute paper versions of the survey to neighbors on their block in July 2012. CPN board members and other volunteers went door-to-door distributing surveys in summer 2012.

A follow-up email was sent in September to the CPN list. Reminders were posted on Facebook as well. Five hundred and seventeen people started the survey and 473 people finished it. Analyses were based on all answers to a question including answers from respondents who did complete the entire survey. Given that a variety of administration modes were employed, it is unclear exactly how many surveys were distributed, and thus it proves difficult to calculate an accurate response rate. Therefore, while the survey results provide valuable insight into the opinions of Cedar Park residents, they cannot be generalized to the Cedar Park neighborhood in its entirety.

For example, the majority of survey data was collected online. Based on census data, particularly regarding income, about the digital divide, we know that at least 1/3 of Cedar Park adult residents were unable to complete the survey due to lack of internet access. This means that lower-income residents may be underrepresented in the sample represented by survey respondents.

It is also notable that more residents who have lived in the neighborhood for less than 10 years completed the survey than those who have been here longer. Although the number of respondents who reported living here more than ten years may correspond accurately with actual census data, one might have expected higher participation from this group in a survey such as this.

Lastly, the number of renters included in this survey sample is smaller than the actual percentage of neighborhood residents who rent vs. own. However, the number of renters who did participate is notable in that many renters clearly feel a sense of ownership/belonging in the community.

In short, the data upon which this report is based on are most likely bent in favor of more recent residents of the neighborhood, who own their homes and have access to the Internet. Therefore, conclusions based on this survey data should be made with caution given that responses may not accurately represent the opinions or experiences of neighborhood residents on the whole.

This report was prepared by Ray Murphy with significant assistance from Ana Lisa Yoder, as well as David Hinchler and Algernong Allen. Survey data analysis was provided by Monica Allison, Mahari Bailey, David Hinchler, Ray Murphy, Joel Nichols, Beverly Rouse, Maureen Tate, and Ana Lisa Yoder.

These volunteers analyzed replies to the open-ended questions and looked for common themes and trends. Feedback was also provided by the CPN board of directors. Generally, four or five categories were created (plus a category for outliers) and then each answer was assigned to a category. This method is somewhat subjective but allowed for qualitative analysis of narrative questions. Results were then exchanged among the group and feedback was exchanged aimed at guaranteeing as much objectivity in the review of qualitative data as possible.

KEY FINDINGS

1. In almost equal measure, **a combination of these five factors** is the reason that most Cedar Park residents live here: **a sense of community, beauty/architecture/green space, affordability, convenience, and diversity.**
2. A majority (59%) of survey respondents have considered leaving the neighborhood at some point in time. The most commonly cited reasons are listed below, in order of how frequently they were cited (a=hi).
 - a. Concerns about crime or safety
 - b. Job opportunity out of state or desire to live in a different state or city
 - c. Concerns about the quality of local schools and quality of life issues (bad neighbors, litter, or problem businesses)

Those who have lived in Cedar Park for less than two years were two times as likely as all other respondents to think about leaving, and mostly contemplated moving to Center City.

3. Respondents were asked to rank a series of factors that most impact their decision to live in Cedar Park:
 - a. Transportation and parks/green space were tied for first
 - b. Diversity and affordability were tied for a close second
 - c. Family and friends who live nearby, proximity to jobs, historic character of the neighborhood, and the availability of restaurants businesses and services were all tied for third
4. The most common changes respondents have seen in the neighborhood since moving here included the following order of ascending frequency:
 - a. The increase of businesses on Baltimore Avenue
 - i. Many respondents like the new restaurants and specifically the expansion of Mariposa Food Co-op
 - ii. Many respondents emphasized that businesses should be locally owned and some were concerned that chains will change the flavor of the neighborhood and should not be encouraged
 - b. Improved safety/less crime
 - i. Some respondents noted the increased police and UCD security presence
 - ii. Longer-term residents were more likely to think that crime had decreased (and were especially happy that they feel safer walking in the neighborhood at night) than younger residents
 - c. Property improvements and increased value along with gentrification/less affordability were tied for the third most commonly cited changes. There was some concern that younger

people moving into Cedar Park do not have the same investment in the neighborhood that the older residents have.

5. Many respondents expressed concern about a decrease in diversity and gentrification. Some simultaneously desire decreased crime and increased property values, which unfortunately tend to be correlated with the socio-economic composition of a neighborhood.
6. In response to specific questions about zoning, neighbors were asked to rank a series of zoning characteristics. The most important were:
 - a. First, zoning should favor locally-owned and operated businesses
 - b. Second, new construction should compliment the design and scale of existing buildings in the neighborhood.
 - c. Third, our main streets should meet the service and shopping needs of residents and strengthen the walkability of the neighborhood.
7. There was less consensus on other key zoning issues:
 - a. Sixty-two percent of respondents think an increase in the rental apartments is somewhat important or not important compared to 40% of respondents who think such an increase is slightly important or important.
 - b. Thirty-seven percent of respondents think an increase in single-family homes for purchase is somewhat important or not important compared to 59% of respondents who think such an increase is slightly important or important.
 - c. Fifty-five percent of respondents think an increase in multi-family homes for purchase is somewhat important or not important compared to 40% of respondents who think such an increase is slightly important or important

Survey respondents think that CPN can play a role building on the neighborhood's strengths and addressing some of its challenges. This includes CPN doing more to build a sense of community through the planning of events and forums, especially those that celebrate community and promote interaction amongst diverse populations. Respondents also suggested that residents do more to organize or advocate for policy changes to address some of the challenges the neighborhood faces.

HOW THESE FINDINGS WILL BE USED

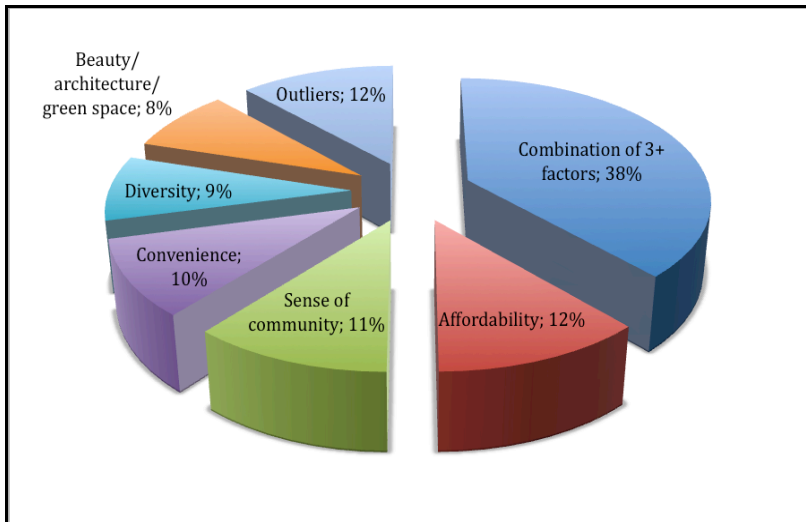
There are three primary ways that the findings of the CPN survey on the future of the neighborhood will be used:

- 1) The CPN board will analyze the findings from the survey. Their analysis will then be used to evaluate the CPN committee structure as well as the organization's program and annual budget. As a responsive, membership-based organization, the survey findings are an invaluable tool to help elected board members best serve their constituents.
- 2) The Philadelphia City Planning Commission has invited a representative of CPN to participate in a steering committee to give input on the city plan for the University City and Southwest neighborhoods. That representative will faithfully represent the views of Cedar Park residents as appropriate in response to requests for feedback from the City Planning Commission.
- 3) The data and analysis of the data will be made publicly available. At a time when so many residents are contemplating the future of the neighborhood, information about other viewpoints and opinions is valuable.

DETAILED REPORT ON FINDINGS

1. Why do you live/own a business in Cedar Park?

There are five primary reasons that survey respondents said that they lived in the neighborhood and the majority cited a combination of at least three of these reasons as influencing their decision to live here:



Unless noted, there was generally no difference between renters and owners when responding to this question. Here are examples of the ***most typical answers to this question*** (these all combine three or more of the primary reasons people choose to live here):

- I love this neighborhood! It is the first place I have lived that feels like home. The architecture, the trees, the folks who live here, it is a wonderful neighborhood full of beauty and life.
- Because it is sweet, interesting and beautiful. Because people in the neighborhood trust the voices and desires of all community members I like the trees, parks, small shops. It is close to Center City but doesn't feel like it. It is a neighborhood but also has lots to see and do beyond just houses. We both work at Penn and enjoy the short and easy commute to our jobs. We appreciate the eclectic socio-economic diversity of our neighborhood, love the architecture, our home, green feel and the mix of perspectives of our neighbors
- Cedar Park (specifically Saint Bernard Street) is the best block that I have ever lived on. There is a wonderful sense of community here that I've not experienced elsewhere. We have access to good food, nightlife, and restaurants. Cedar Park could easily compete with other neighborhoods (locally and nationally) for quality of life, probably at a fraction of the cost in those other places.

- Beautiful tree lined streets, architecturally interesting and large homes, diverse culturally and ethnically, and mostly liberal and easy access to Center City. Affordable when we bought 12 years ago.
- I grew up in West Philly. My church, SFDS, is nearby. I love the trees, easy parking and public transportation.

About half of survey respondents focused on one factor that motivates them to live in Cedar Park with an almost even distribution among the following five factors as reasons that people live here:

Sense of community-This refers both to the community of all Cedar Park neighbors as well as proximity to friends, family and personal communities (communities rooted in political identity, queer politics, and religious institutions were cited the most).

- I've always lived here since I moved to Philly 6 years ago, my friends are here, and it's lovely! I'm about to buy a house here!
- Because it seems to maintain a community feeling despite the many changes over the past 10 years.
- I love West Philly! I came here in the middle 1970's with Movement for a New Society/the Life Center and then stayed to raise my children.

Convenience-primarily covered proximity to Penn and to Center City. Many also mentioned access to parking, public transit, highways, walkability and closeness to stores and services.

- I work and take classes at the University of Pennsylvania. I've lived in West Philly since I was 19 and would never want to live anywhere else!
- It is close to my work and I love many of the great places to eat. It's also a nice area to have and walk a dog.
- I want to send my child to PAS and be close to the city, my place of employment.

Affordability-this includes home prices, home values, rents and investment potential:

- When I bought my house, it was a neighborhood I could afford
- My wife and I recently purchased a new home in Cedar Park. We chose this neighborhood because it was affordable but growing. We are looking forward to the new changes in the neighborhood. However, our concern is that the new changes will push long-time residents out. We hope the new changes won't push the long-term residents out.
- The apartments are bigger and cheaper than in other neighborhoods I want to live in.

Renters and owners cited affordability in equal measure. However, neighbors who have lived in the neighborhood less than twenty years were more likely to cite affordability than those who have been here longer.

Diversity-typically respondents talked about race, income, religious background, political and philosophical viewpoints (specifically anarchists), sexual orientation and gender identity.

- It is a diverse area of the city where I can be neighbors with other people of color, families, young people, and artists.
- Been here over 30 years - wanted to raise kids in a mixed neighborhood.
- I moved here because I loved the diversity, and I have stayed here because I grew to love my neighbors and continued to love the diversity, which I now fear is threatened.

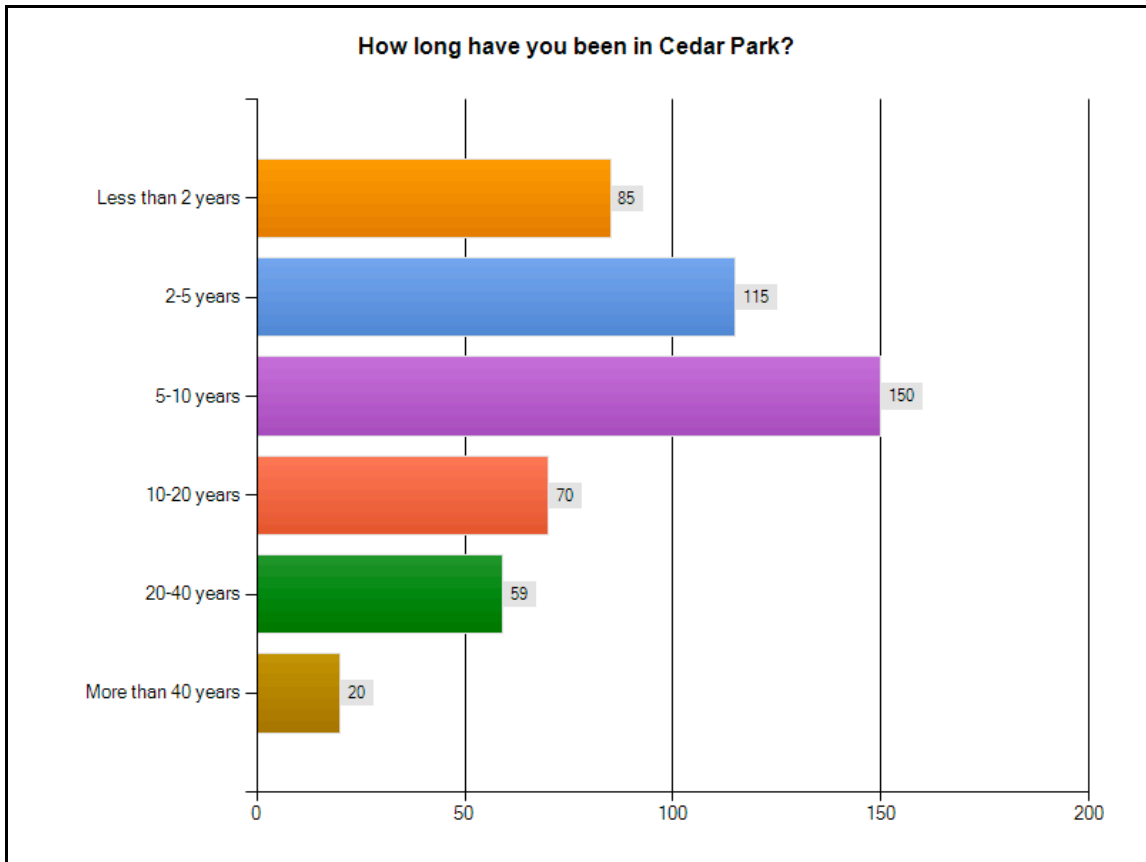
Beauty, architecture, green space-this includes trees, parks, old houses, physical space, and scale of neighborhood.

- Because I like it. Big city locale with spacious suburban feel - mostly attributable to the trees and greenery, but also the cool lookin' architecture.
- I lived here for over 40 years because it was quiet and beautiful and a friendly place to raise my family.
- The trees and back yards. It's as far as you can get away from the city with still living in it. We loved the house, the block and the park.

Outliers-These were the answers to the question that didn't fit neatly into a category, or not in any sufficient number. There were roughly four groups in this category: landlords or business owners; people who live here because they grew up here; people who reported that they lived here simply because they own a home here or completely random replies.

2. How long have you been in Cedar Park?

Of about 473 respondents, 70% have been in the neighborhood for less than 10 years:

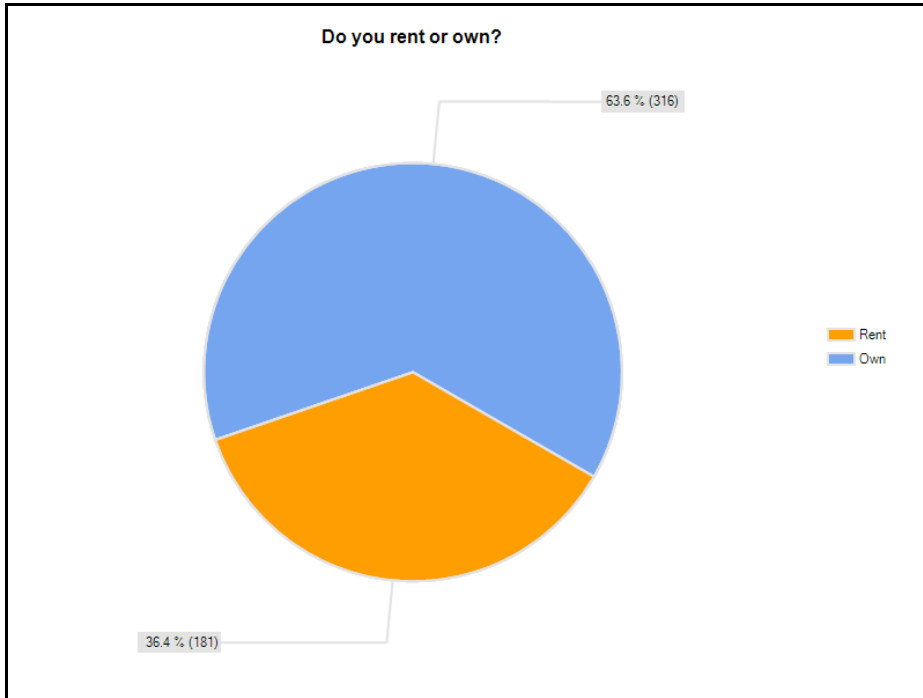


Those who reported living in the neighborhood for more than 10 years were almost all owners (85% of those in the 10-20 year cohort, 91% in the 20-40 year cohort and 95% in the 40 year + cohort).

Among the cohort of people who have been in the neighborhood for 5-10 years, 66% were homeowners. The 2-5 year cohort was almost evenly split between renters and owners and 30% of those who have been living here less than 2 years were homeowners.

3. Do you rent or own?

The majority of survey respondents were homeowners:



Note that a majority of people who have lived in the neighborhood for less than five years are renters.

4. Name three things you like about Cedar Park:

This open-ended question provided an opportunity for respondents to talk about the qualities of the neighborhood that they like:

Quality	Number of Respondents
Green space	244
Sense of a welcoming community	204
Neighborhood character: trees, architecture, overall look	153
Transit friendly	148
Local and diverse businesses	141
Diversity of neighbors	129
Walkable/sustainable community	68
Community and neighborhood activities	67
Miscellaneous	65
Affordability	45
Family friendly	44

Green space and a sense of a welcoming community were the most frequently cited things respondents said they liked about the neighborhood. Green space includes both the trees and gardens in the neighborhoods and also access to parks. In terms of community, many respondents said that they said that they felt welcomed here and that they truly had a sense of living in a community.

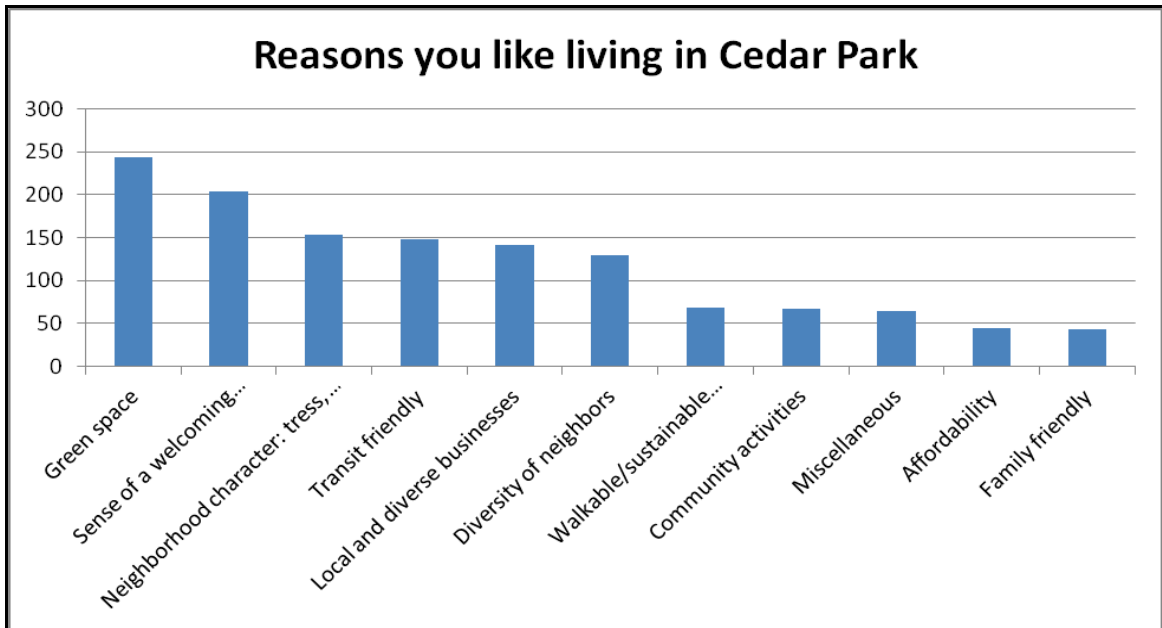
The next tier of common responses cited neighborhood character, transit, local and diverse businesses and the diversity of neighbors as reasons to like the neighborhood.

Neighborhood character was generally in reference to the architecture in and general appearance of the neighborhood. Transit referred to neighbors' access to and use of public transit, bike and walking accessibility. Diversity of the neighborhood referred to referred to neighbors of many different identity groups as well as socio-economic diversity.

In terms of businesses, many respondents appreciated that many are locally owned. Others liked the variety of options along Baltimore Avenue in particular which offer varying services. A preponderance of these respondents cited restaurants and access to groceries in the neighborhood as particularly favored services.

Listed above are other reasons that respondents said they liked about Cedar Park. Most of these are self-explanatory. It is worth noting that in terms of community activities that respondents said they liked, many are supported by Cedar Park Neighbors.

The miscellaneous responses covered a wide range of topics, but the most commonly cited reasons that these respondents cited were experiencing a sense of safety or the politically progressive and LGBT-friendly nature of the community.



5. Name three improvements that you would like to see in Cedar Park:

This open-ended question provided an opportunity for respondents to talk about qualities the neighborhood they would like to be improved or changed:

Quality	Number of Respondents
Less crime, improved safety	262
Less blighted or vacant buildings & lots	110
Improved trash services	95
Maintain affordability	94
More, diverse and thriving businesses along commercial corridors	92
More and improved green space	87
Miscellaneous	85
More community/neighborhood events/services	78
Improved streets and lighting	76
Improved schools	66
Improved transit features and options	50

The number one improvement that Cedar Park residents seek is in terms of policing, crime and safety. The majority of this group would like to feel safer in the neighborhood. Some thought more police was a way to achieve this. However, about 10% of this group thought that less police was the solution.

Some sample comments:

- Safer streets, especially after dark
- Holistic crime reduction strategies- including investment in youth programming

In terms of improvements that could be made to the neighborhood, respondents also made a strong statement about the appearance of the neighborhood which likely correlates strongly with those who talked about the character and general appearance of the neighborhood, as well as green space, in the previous question. Specifically these respondents were concerned about derelict property and to a slightly lesser extent, trash in the neighborhood. Sample comment:

- Coordinated group effort to 1.) buy up blighted properties, 2.) help homeowners who have trouble maintaining their homes/yards and 3.) shame or penalize slum landlords.

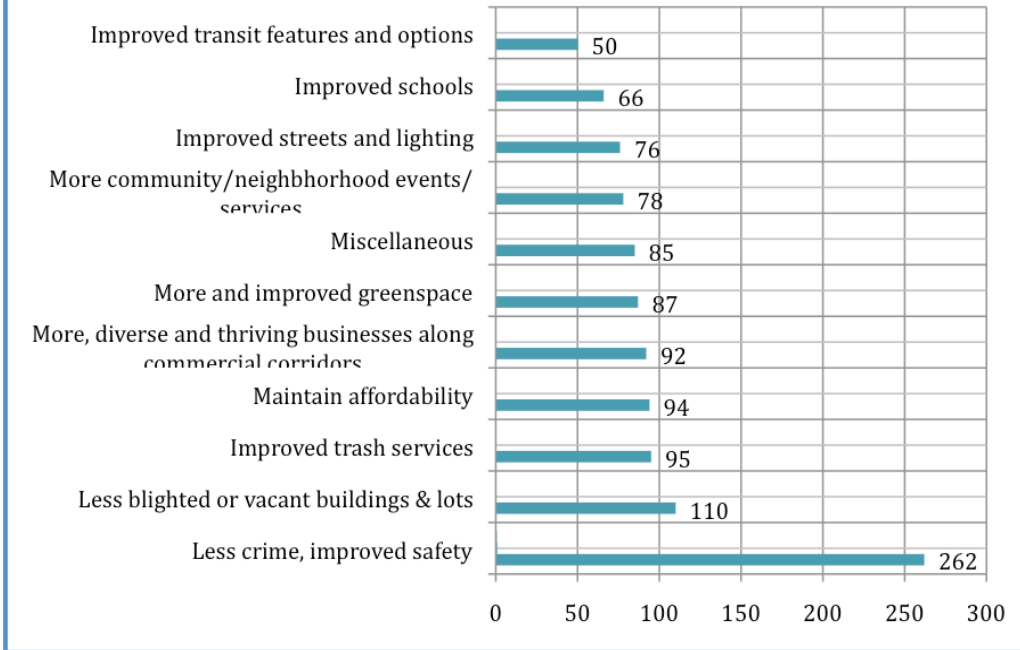
Businesses along commercial corridors, primarily Baltimore Avenue, were another area of improvement cited by respondents. Most of these respondents talked about their desire for more restaurants or more fresh food/grocery options. There was a smaller subset that had concerns about nuisance businesses.

Maintaining affordability was an improvement suggested by some respondents. One-third of this group specifically mentioned gentrification as a concern.

The rest of the suggested improvements listed above are self-explanatory. However, the desire for more structured community events and services is an area of improvement that Cedar Park Neighbors is in a unique position to address.

The miscellaneous category included suggestions for areas of improvement in terms of stray animals and more social services.

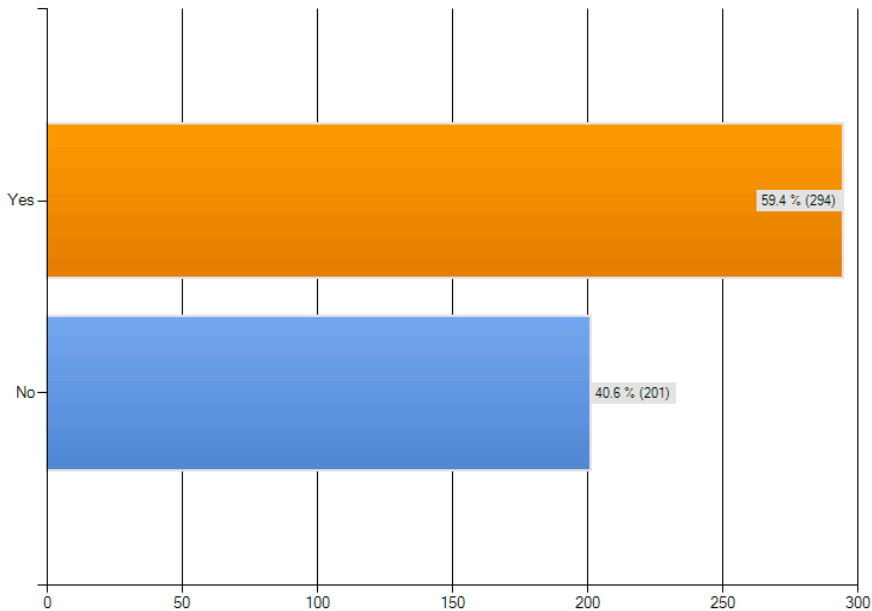
Improvements that you would like to see in Cedar Park



6. Have you ever considered leaving Cedar Park?

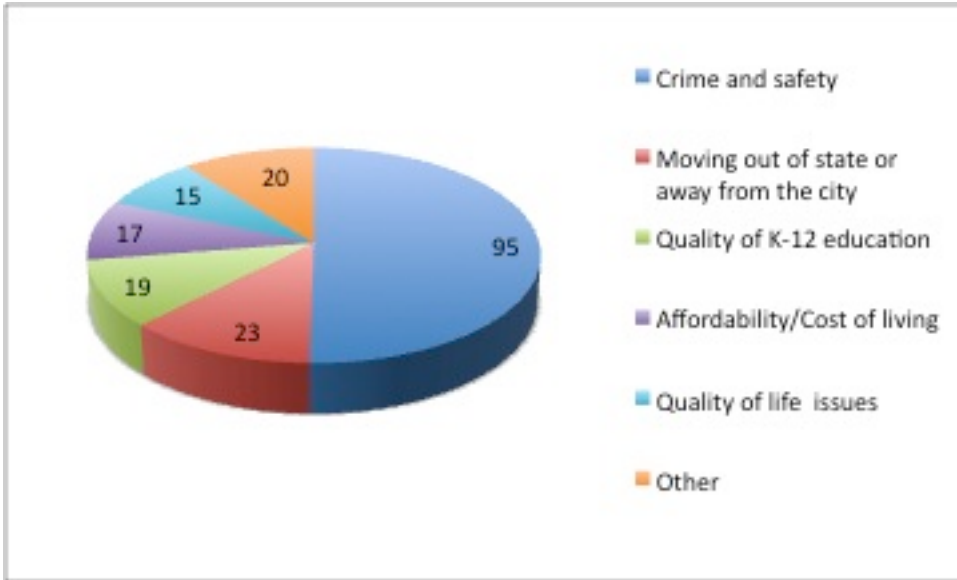
A majority of Cedar Park residents have considered leaving the neighborhood at some point in time:

Have you ever considered leaving Cedar Park?



Both renters and homeowners seem to have considered leaving the neighborhood in the same proportions. Looking at the length of time someone has lived in the neighborhood, the likelihood that someone has considered leaving the neighborhood goes down the longer someone has lived here, with the exception of those who have only been in the neighborhood for less than two years. A slight majority of these recent arrivals has NOT considered leaving Cedar Park presumably because they have so recently arrived.

7. If you answered "yes" above, why did you consider leaving?



The primary reason Cedar Park residents consider leaving is a concern about crime or safety. Those who reported crime a major factor seemed to be represented across the board by owners/renters as well as short term or long-term residents. Long-term residents frequently referred to periods in the 1980's-1990's when the crack epidemic was at its peak as a time when they seriously considered leaving. Despite discouragement about crime, few reported that they were actually planning to leave.

Here are some of examples of what people said in response to this question:

- During the "crack epidemic" [of the] late 80's early 90's our home was broken into 3 times, my wife held at knife point. I was also jumped on the street and had my ribs broken.
- City life can be taxing - noisy neighbors, petty crime - & CP has its share of the knucklehead factor. There are times when I say to myself, do I really want to have to worry about the dope dealers and their teenage hangers-on around the corner for the rest of my life?
- Crime from neighboring areas, as well as too many muggings during the day, targeting families.

After crime, the next largest group of people had considered leaving for a job opportunity out of state or simply a desire to live in a different state or city and, in a small number of cases, a desire to live somewhere more rural.

Concerns about the quality of local schools and quality of life issues (like bad neighbors, litter or problem businesses) were next and occurred with the same frequency as one another.

The remaining group of reasons covered a wide range of topics though the two most common themes were: 1) older residents were considering downsizing from a large house 2) younger residents who wanted to be closer to nightlife and amenities to be found in Center City.

It is notable that people who have lived in Cedar Park for less than two years were the most likely to have considered leaving. 17% of the people who responded to this question were a part of this cohort. This cohort thought about leaving at twice the rate of every other group in the survey.

8. How much does each of the following impact your decision to live in Cedar Park?

This is similar to the very first question asked in the survey (“why do you live in Cedar Park”) except that rather than being open-ended, respondents were asked rank a list of attributes. The factors that respondents were most likely to say had a lot of impact on their residence in the neighborhood were transportation and parks/green space. Diversity and affordability were tied for a close second. Family and friends who live nearby, proximity to jobs, historic character of the neighborhood, and the availability of restaurants businesses and services were tied for third.

These top responses overlap neatly with the top responses to question 1 except that “sense of community,” which many folks cited in answer to question 1, was not a option here. It is interesting to note that access to transportation and green space rank so highly here perhaps because despite differences in age and income particularly, everyone relies on and enjoys these amenities equally.

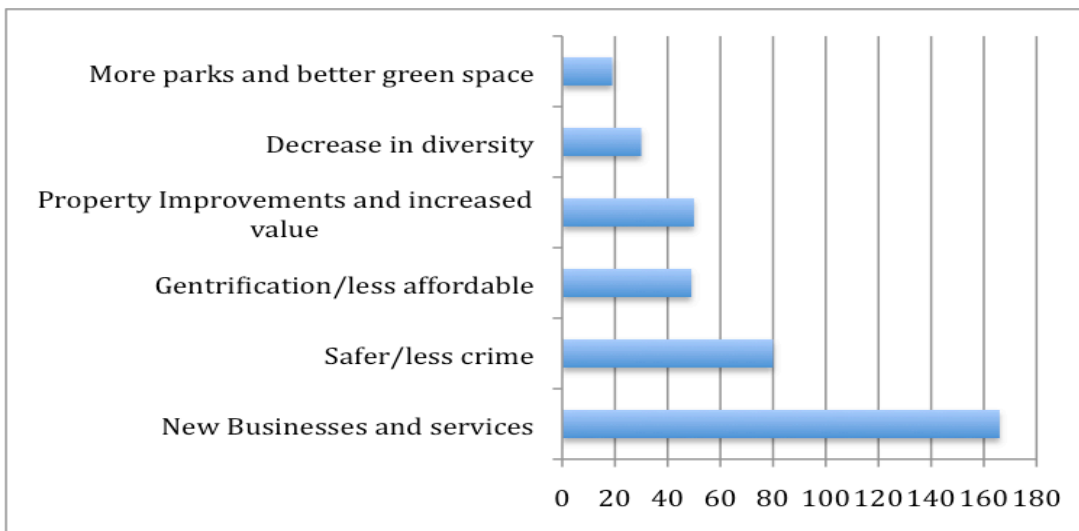
There were some areas of disagreement:

- An equal number of people said that these factors impacted their decision to live here “a lot” as those who said “not at all”:
 - Parking
 - Proximity to Penn/Drexel
 - Taxes
 - Schools
- About 60% of respondents to a question about property values said that the issue impacted their decision to live here “a lot and 40% said “not at

all.” This could be mirroring the number of owners vs. renters completing the survey.

9. What changes to the neighborhood have you seen since you came here?

The most commonly cited change observed by respondents was the increase of businesses on Baltimore Avenue. Many respondents like the new restaurants specifically and the expansion of Mariposa Food Co-op. Some emphasized that businesses should be locally owned and that big chains will change the flavor of the neighborhood and should not be encouraged.



The second most commonly cited change was improved safety and less crime. Some respondents noted the increased police and UCD security presence. However, older residents were more likely to think that crime had decreased (and were especially happy that they feel safer walking in the neighborhood at night) than younger residents. Of the crime that exists in the neighborhood, respondents commented that it might have to do with the influx of young people and neighbors who are perceived to have money. It is notable that many of those who reported that they thought the neighborhood was safer tended to live east of 50th street or north of Baltimore Ave.

An almost equal number of people are concerned about gentrification/less affordability as the group who has been supportive of increased property values and property improvements, but both are statistically small compared to the overall number of responses.

The former group talked about the displacement of long term residents who can no longer afford to live and shop in the neighborhood. This is credited to increased property taxes, home prices and rents. Most were concerned that this economic change will decrease diversity and the character of the neighborhood as a whole. Most of those in this cohort also cited a concern that many of the new

businesses are geared toward the influx of people moving in and not taking into account what long-term residents might need to access.

The latter group talked about the improved streetscape of Baltimore Avenue with an emphasis on businesses that have improved their facades; homeowners doing work to their property; reduction in blighted property and land; and improved cleanliness of the neighborhood in general. In this group, there were also comments regarding increased rents and property values and the subsequent concern that this is forcing some older residents out of the neighborhood.

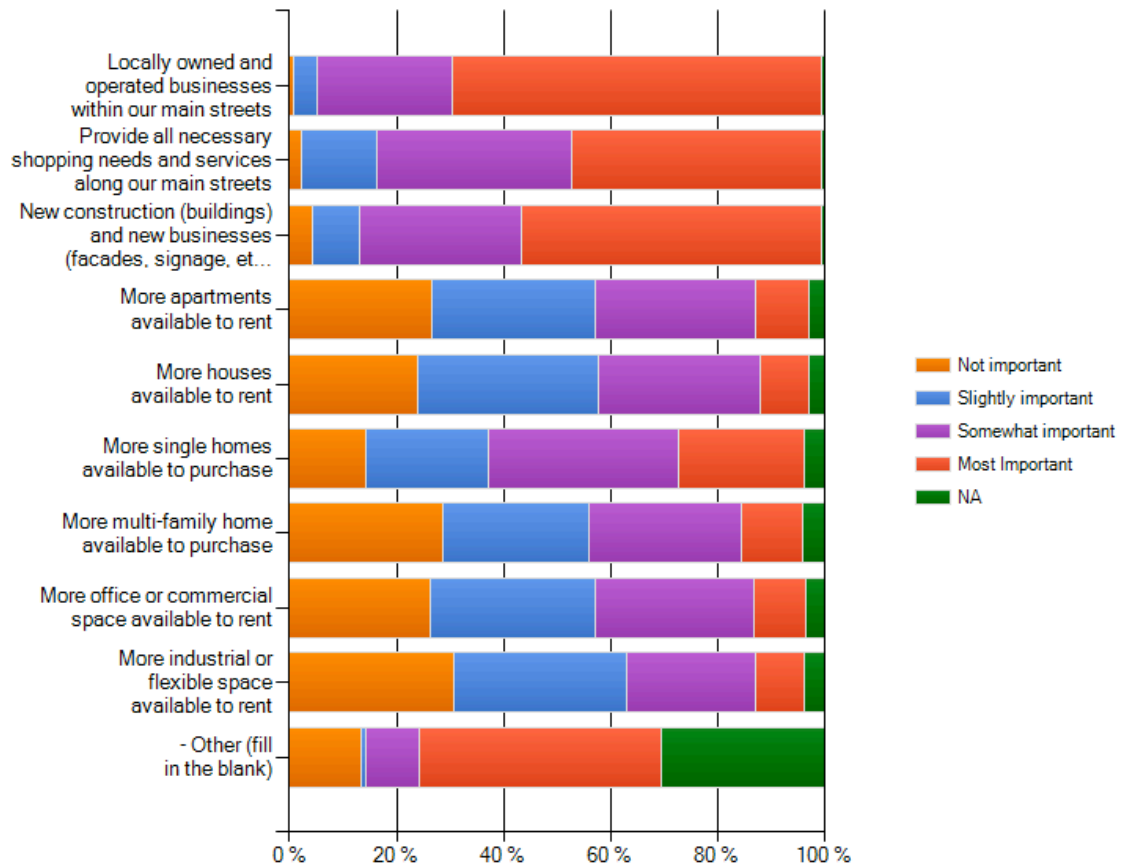
Another concern was that the younger people moving into Cedar Park do not have the same investment in the neighborhood that the older residents have. Specific examples of this include younger neighbors who: 1) seem less friendly or willing to get to know others getting to know their neighbors 2) don't help to clean their streets 3) don't buy from the community 4) less interest in serving the greater good, like helping a neighbor paint or fix their property, as people used to.

One category of respondents talked about the decrease in diversity in the neighborhood. Most comments were regarding the age of the average new homeowner being younger and white professionals with young children. Several comments were that the area was becoming a "stroller walk."

Some people felt that our churches are losing congregations because these young people are not religious like the older residents, they feel that the businesses are catering to them as the new generation and that puts older residents at a disadvantage. Most residents feel the community is losing its flavor, and is becoming very generic and wealthy compared to what it once was.

Green space received the smallest number of responses. The comments focused on the renovations of Cedar Park, Clark Park and the expanded use of the Woodlands Cemetery. There were also comments about the number of homeowners who are planting trees/flowers/vegetables and as well as the increase in community gardens and farms.

- 10. As part of the neighborhood plan, the Planning Commission will be addressing the issue of zoning to individual properties within both residential and commercial areas as well as the character of our main streets (Baltimore Avenue, 52nd Street, etc.). Please rank the following characteristics**



Cedar Park residents are generally in agreement when it comes to zoning issues. The areas of most agreement:

- First, zoning should favor locally-owned and operated businesses
- Second, new construction should fit the design and scale of existing buildings in the neighborhood.
- Third, our main streets should meet the service and shopping needs of residents.

There was also a large category of other responses to this question. Generally, this group can be divided into four: 1) new construction should be discouraged in favor of reuse of existing spaces 2) affordable housing should be a priority 3) green spaces should be preserved and expanded 4) Chain and corporate-owned stores should generally be discouraged (although there is a lot of interest in a supermarket).

There was some disagreement among survey respondents when it came to residential zoning (all numbers below are approximate):

- 62% think more apartments to rent are somewhat important or not important vs. 40% who think they are slightly important or important. Remembering that 62% of survey respondents identified as homeowners, and 36% identified as renters, the division above indicate that those who already own homes are probably less interested in an expansion of the rental market.
- 37% think more single-family homes for purchase are somewhat important or not important vs. 59% who think they are slightly important or important

Interestingly though, it seems at least some significant number of existing homeowners would like to see more single homes available for sale.

- 55% think more multi-family homes for purchase are somewhat important or not important vs. 40% who think they are slightly important or important

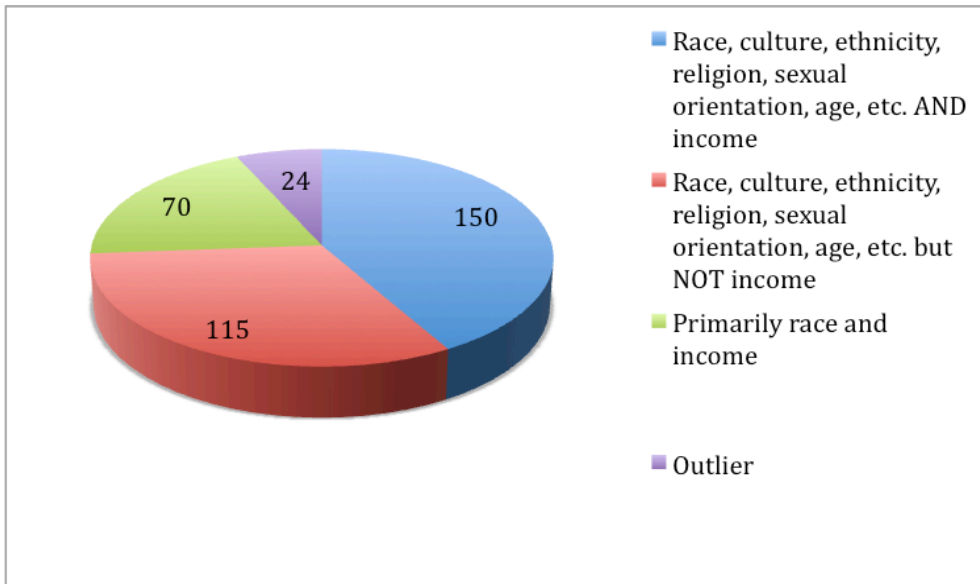
Expanding the number of multi-homes for sale was of less interest to survey respondents. It would be interesting to learn more about the 40% who see this is a priority: are these survey respondents potential investors/landlords or are these future owner-occupants looking to supplement their income by renting out a portion of their house?

- 57% think more commercial/flex space homes for rent are somewhat important or not important vs. 40% who think they are slightly important or important

Again, it would be interesting to learn more about the 40% who would like more commercial/flex space.

11. A lot of Cedar Park residents live here because they value diversity. How do you define diversity and what do you think is required to keep the neighborhood diverse?

This question had two parts. In response to the part of the question that asked survey respondents to define diversity, about 350 responded.



Just this question alone is awesome! THANK YOU! This is why I love living here! As a Cedar Park resident I am very proud of our diverse & friendly community. It makes our neighborhood stand out & attracts those that share the same values!

The largest group of people provided a definition of diversity that was generally inclusive of all of the different kinds of people who live in Cedar Park. Here are some examples:

- Diversity for Cedar Park means people of different cultures, races, genders, ages, and socioeconomic statuses living together in the same neighborhood.
- Economic and racial diversity. Also, balance between the influx of newcomers, and people who have lived here for a long time. The neighborhood has to stay affordable to stay diverse.
- Diversity of race, ethnicity, gender preference, cultures, religions, income levels, occupations, social status, education levels. A diverse neighborhood values the contributions of all residents, not just the affluent homeowner.
- I think diversity is important not just in race, but in age, lifestyle, etc. I think the neighborhood is a nice mix of families and young people. I've noticed that the racial diversity has decreased over five years (fewer residents of color on my block, etc.)
- Nationality, color, language, different income levels, education levels, type of ethnic cuisine/businesses

The next largest group of people tended to define diversity in a very broad way, often along the lines of "live and let live." This group tended excluded class and income from their definition of diversity and was also less likely to mention sexual orientation/gender identity:

- A place where anyone can feel welcome and safe, regardless of race, religion, gender, orientation, political affiliation, etc.
- A well rounded, fairly treated community with representation from multiple cultures
- People understanding that we are all equal

The third group is not dissimilar from the first in that they often provided an expansive definition of diversity but they tended to strongly emphasize the influence of race and income level in the neighborhood specifically. They also tended to highlight the ways in which differences in race and class have historically been tense/in need of more work. Here are some examples:

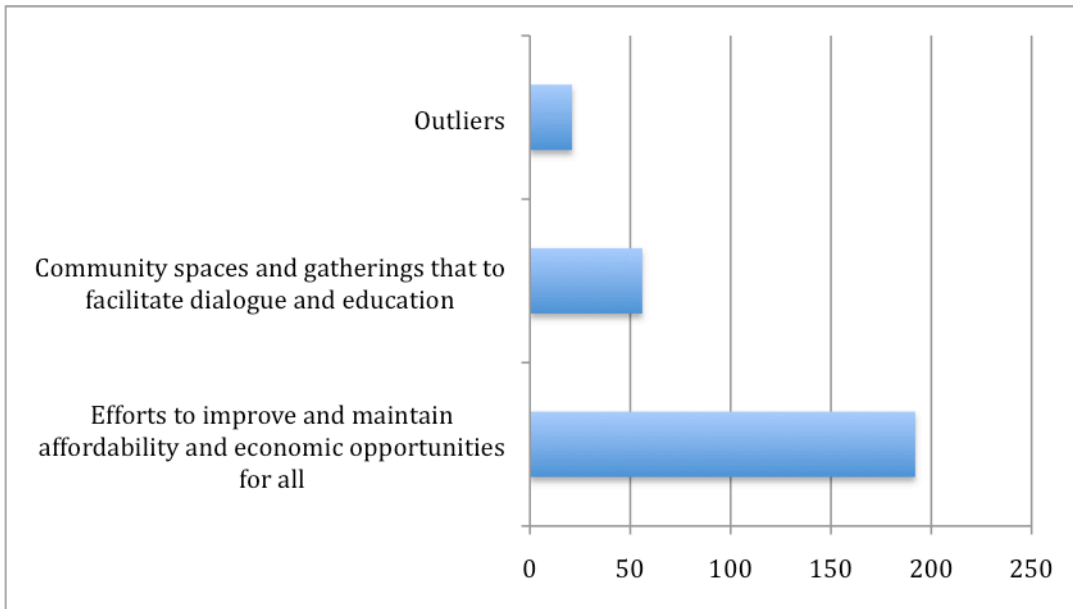
- The diversity I see that is changing in the neighborhood is economic diversity, which can result in ethnic and racial diversity. Diversity, to me, means that I can find people who are like me and people unlike me -- some groups that I will naturally fall into feeling very comfortable with & others that will expose me to difference and challenge me.
- To me it means not only having many different races, ethnicities, languages, ages, and family structures present -- it means CENTERING the experiences, cultures and needs of the communities that have lived in Cedar Park the longest and are marginalized
- Diversity includes racial, ethnic, immigrant, class, sexuality and gender. I am most concerned about the sharp decline in the number of black people who are able to afford the neighborhood and people who are born and raised Cedar Park getting pushed out. The responses grouped together as outliers covered a wide variety of topic. Those that were most similar to one another were the four or five that questioned whether diversity was worth defining or was even a topic worthy of further conversation.

Of everyone who responded to this question, about 15% also defined diversity as something "active," meaning that diversity requires care and maintenance. Here are some examples:

- Being intentional about diversity as a priority in many ways is needed to maintain and build on the diversity that is here, plus tolerance from and for all.
- Valuing diversity has to mean more than just lip service as well. If we were to allow the supposed "invisible hand of the market" to govern the "diversity" of our neighborhood, we would lose it very quickly. Instead, we must find ways to not only promote diversity, but protect the diversity that already exists

In response to the second part of the question, which asked survey respondents how to maintain diversity in the neighborhood, about 280 people responded:





A significant majority of respondents said that continuities diversity requires concerted efforts to improve and maintain affordability and economic opportunities for all:

- I fear rising housing prices are going to destroy much of our diversity.
- Lower rents and assistance for first time homebuyers can help maintain socio-economic diversity. Also, a mix of stores and businesses- too much high end retail creates an inaccessible environment
- In order to maintain that balance, I think that among other things we need to make sure there is a good balance between those who rent and those who own, encourage development of businesses owned by people of color, and increase access to safe, quality public schools.
- I was attracted to the neighborhood for the modest property values that are expected to increase in the next few years. However, I understand this is often the recipe for gentrification. Rising property values often bring a rising tax bill. This can push out the long-term residents who make the neighborhood great
- When AVI comes in, "homestead" exemptions to protect older, fixed-income residents will be essential. Maintaining & improving public transit connections, along with affordable rental stock, will be essential to keeping the n'hood attractive to low- and middle-income working folks. Generally speaking, I'd love to see 52nd St. continue to develop.
- I think our neighborhood has to maintain a diversity of rent prices in order to keep a diversity of people.

A smaller subset (which is not necessarily at odds with the larger groups) said that diversity requires spaces and gatherings that facilitate dialogue and

education:

- We can sustain diversity by programming activities that bring diversity together (the Jazz concerts) We can promote more diversity by organizing around a topic that matters to everyone (Education)
- Folks of all ages & races, with all sorts of priorities - EXCEPT, I don't think we should tolerate folks' intolerance. What's required? Leadership from City Council, willingness on the part of neighbors to meet with others & explain views & listen to problems & solutions. Willingness to accept change.
- More communications between block captains and ALL residents - only a few people know about events/due dates and times etc.
- Diversity needs on- going dialogue and celebration and respect for similarities and differences of age, race and culture.

Homeowners and renters replied in equal proportion to both of these questions. In terms of the number of years someone had lived in the neighborhood, again the proportion was about the same. However, those who have lived here for 5-10 years were more likely to cite affordability over education/dialogue (35% vs. 23%) and those who had been here less than two years were more likely to prioritize education/dialogue (25% vs. 13%).

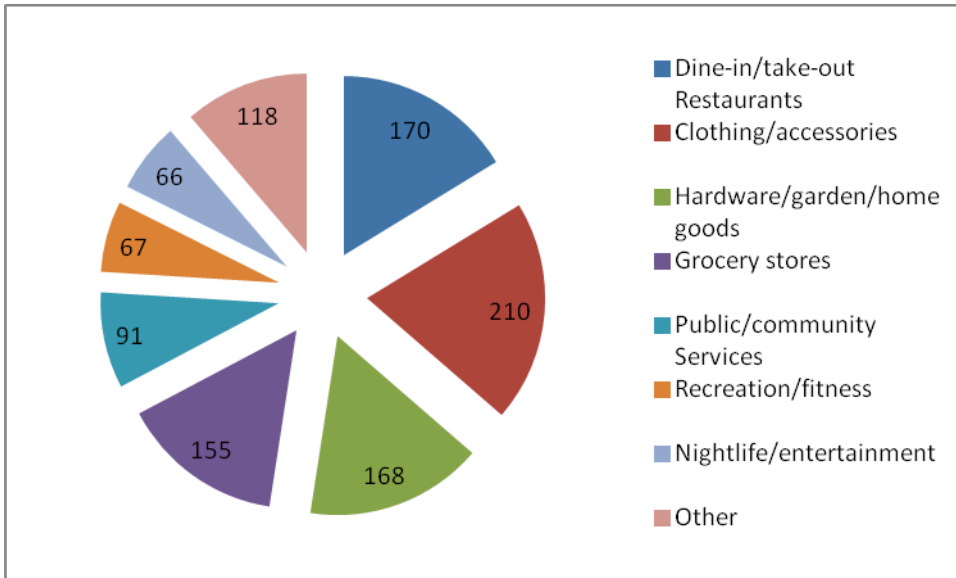
There were a relatively small number of responses not easily grouped together. These outliers included some who talked primarily about access to public transit, better schools and a reduction in crime/violence as necessary for diversity. There were also four or five responders who don't see any specific way to keep the neighborhood diverse:

- I think the neighborhood will stay diverse for the foreseeable future no matter what.

Slightly larger in number (perhaps ten people) said that diversity is important to them, but felt at a loss to prescribe a method to maintain it:

- Diversity is age, ethnic background, socio-economic status, renter/owners, etc. Not sure what is required to keep the neighborhood diverse. That's a big question and I leave that to CPN.

12. Please name three business or services that you wish were offered in the neighborhood:



Responses to this question are consistent with the Baltimore Avenue conversation that Cedar Park sponsored in 2010, especially the desire for a grocery store and a garden/hardware store.

Newer neighbors were interested in more restaurant options, especially vegan dining options. Long-term residents are particularly interested in more grocery stores.

Length of time in the neighborhood (which could be a proxy for age) demonstrates an interest in similar services but for different life stages. For instance, someone who has been in the area for 2-5 years is more likely to want more child care options whereas someone who has been in the area for 20-40 years is more interested in extracurricular activities for older children. Another example is in terms of entertainment: some older residents expressed an interest in a low-key jazz club and typically it was younger residents who expressed an interest in a nightclub.

There were also some interesting linkages:

- Those who wanted more grocery stores tended to also want more restaurants
- Similar links:
 - Libraries and schools
 - Entertainment and restaurants
 - Hardware and arts/crafts stores
 - Schools and recreation/extracurricular activities
 - Education and community development

13. Anything else you would like to add?

14. Names and locations

161 people provided their name.

171 people provided their address or the block that they lived on. Of these, most blocks in the neighborhood were represented. The 5000 block of Cedar, the 4900 block of Walton, 4700 block of Springfield, 500 block of South 48th, the 4700 block of Cedar, the 700 block of South 49th and the 800 block of South 49th were particularly well represented.

Populous blocks with only one or two responses include:

- South of Springfield Ave in general from 46th 52nd.
- The 4800 and 4900 blocks of Larchwood
- The 4700 and 4800 blocks of Baltimore
- The 4700 and 4800 blocks of Windsor
- The 600 blocks of South 48th and 51st Streets
- The 900 blocks of South 46th, 47th, 49th, and St. Bernard Streets
- The 1000 block of South 50th Street
- 4900 block of Warrington
- 5100 block of Catharine

Blocks that are known to have houses on them from which there was no response recorded include:

- All blocks of S. 52nd Street
- 4600, 5000, 5100 Larchwood
- 4700 Hazel
- 5100 Walton
- 500, 600 and 800 South 50th
- 5000 Willows
- 5100 Hadfield
- 5100 Malcolm
- All blocks of Pentridge
- 4900 and 5000 Florence
- 4600 Springfield
- 1000 South 47th
- 1000 S. St. Bernard
- 4600 Regent
- 4800, 5000, 5100 Chester
- 4900 or 5100 Kingsessing

Since a majority of survey respondents did NOT give the name of the blocks that they lived in, we can assume that some of the blocks listed above are represented in the survey results.

SURVEY INSTRUMENT

The future of Cedar Park

Cedar Park Neighbors (CPN) is the community association which represents the interests of people who live and work in the neighborhood which stretches north to Larchwood Ave., south to Kingsessing Ave., east to 46th Street, and west to 52nd Street).

A lot of changes have been happening in our neighborhood. As our neighborhood continues to attract new residents and businesses, the board of Cedar Park is seeking guidance from neighbors like you - the people who have a stake in this neighborhood.

In order to best represent you, the board of CPN has put together a survey to find out what you think. Your responses to this survey will allow CPN to determine how to best represent your desires for our neighborhood as it continues to grow.

Based on the feedback of hundreds of neighbors, CPN hopes to be able to report back what values we all share in terms of neighborhood development.

Additionally, the Philadelphia City Planning Commission has asked CPN and other community organizations to give feedback on a new district plan for Southwest Philadelphia and University City. This is part of a larger effort resulting from new City-wide zoning code enacted in 2011. The district plan will be a community/public process to review all existing properties and uses towards developing recommendations for future land-use. In order to best represent your interests, the CPN board is asking for feedback from all community residents and stakeholders about the future of our neighborhood.

Please help in this effort by taking this brief survey:

1. Why do you live/own a business in Cedar Park?

2. How long have you been in Cedar Park?

- Less than 2 years
- 2-5 years
- 5-10 years
- 10-20 years
- 20-40 years
- More than 40 years

3. Do you rent or own?

- Rent
- Own

4. Name three things you like about Cedar Park:

- 1.
- 2.
- 3.

5. Name three improvements that you would like to see in Cedar Park:

- 1.
- 2.
- 3.

6. Have you ever considered leaving Cedar Park?

- Yes
- No

7. If you answered "yes" above, why did you consider leaving?

The future of Cedar Park, part 2 of 3

8. How much do each of the following impact your decision to live in Cedar Park?

	not at all	slightly	somewhat	a lot	NA
Property values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to K-12 schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crime and safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proximity to jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks/green space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family/friends who live nearby	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Historic character	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordability/cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proximity to Penn/Drexel/USP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants, businesses and/or services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family home/where you're from	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. What changes to the neighborhood have you seen since you came here?

10. As part of the neighborhood plan, the Planning Commission will be addressing the issue of zoning to individual properties within both residential and commercial areas as well as the character of our main streets (Baltimore Avenue, 52nd Street, etc.). Please rank the following characteristics

	Not important	Slightly important	Somewhat important	Most Important	NA
Locally owned and operated businesses within our main streets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide all necessary shopping needs and services along our main streets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New construction (buildings) and new businesses (facades, signage, etc.) should fit the scale and character of the neighborhood	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More apartments available to rent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More houses available to rent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More single homes available to purchase	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More multi-family home available to purchase	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More office or commercial space available to rent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More industrial or flexible space available to rent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Other (fill in the blank)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

The future of Cedar Park, part 3 of 3

11. A lot of Cedar Park residents live here because they value diversity. How do you define diversity and what do you think is required to keep the neighborhood diverse?

12. Please name three business or services that you wish were offered in the neighborhood:

1.
2.
3.

13. Anything else you would like to add?

14. What is your name? (optional)

15. What is your address? (optional)

16. What is your email? (optional)