A TALE OF TWO DISTRICTS
HOW POLICY PERPETUATES AND PROLIFERATES DE FACTO SEGREGATION BETWEEN SUBURBAN SCHOOL DISTRICTS

A Dissertation in
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by
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ABSTRACT

Recent demographic shifts of minority and low-income populations to the suburbs have transformed metropolitan areas. However, such transformations have contributed to increasing racial and economic segregation between jurisdictions. This dissertation explores how housing and school district policies of two suburban school districts within an affluent northeast county function together to impact the racial and economic demographic shaping and segregation between these school districts. To better understand the role of policy in the increasing demographic shaping and segregation between northern metropolitan suburban school districts I examined two themes in the literature: the suburban construct as White spaces and the link between political fragmentation in metropolitan areas to education and residential segregation. This research was conducted as a sequential mixed method multiple embedded case study to answer the following question: How does housing and school policy function together to impact the racial and economic segregation between Lower Merion School District (LMSD) and Cheltenham School District (CSD) within Montgomery County, Pennsylvania? More specifically, how have school districts and municipalities’ housing and population demographics in Montgomery County changed between 1960-2014? and What federal, state, and local housing and school district policies and jurisprudence contribute to the demographic segregation between suburban school districts in Montgomery County, and how, respectively, do they do so? Currently, Lower Merion School District is a predominately White and affluent community, while Cheltenham School District is racially and socioeconomically diverse. Yet in 1960, both districts’ municipalities had a predominately White population (95-99%) and similar economic
demographics. Examining these two districts provided an insight to how divergent goals, cultural purposes, and implementation of housing and education policies have contributed to the demographic trajectory of each suburban jurisdiction. Findings suggest that suburban municipalities practiced exclusionary policies to keep out minority and low-income populations from a demographically changing Philadelphia core. However, the cultural narrative of each municipality imparted different zoning and housing goals and policies that shaped the divergent demographics of each area. Lower Merion reflected a Main Line narrative, concentrated in the production of wealth and whiteness. Cheltenham’s narrative focused on creating a diverse community that emerged over time. The findings also suggest that the municipalities shape the geographic and cultural boundaries not the school districts in Pennsylvania. School districts are often reacting to demographic shifts predicated by municipality zoning choices, but they do mostly reinforce the cultural narrative of the municipality that include or exclude populations. Furthermore, the continued perception of quality suburbs as White spaces allows segregated schools and communities to persist.
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Chapter One

Introduction

Statement of the Problem

“Education is touted as the great equalizer;” it has the power to transform the lives of those that have been marginalized. It has the power to bring different peoples together, and overturn generations of ignorance and intolerance (Lester Frank Ward, 1872, as cited in Bowels & Gintis, 1976, p. 347). It can inspire students to participate in the conversations and policies that shape our institutions, and equip them with the fortitude to question and change institutions for the better (Kliebard, 2004).

Yet a quality education is often hoarded in communities with resources, and not distributed equally across school district boundaries (Rothwell, 2012). Each school district overlays specified geographic municipal boundaries with disparate educational and economic resources, leading to disparate educational opportunities to assist students. Fundamentally, where you live often determines what school district and what school you attend, which then determines students’ educational outcomes (Kornhaber, Griffith, & Tyler, 2014; Orfield, 2001a, b).

Multiple school districts and municipal boundaries serve to exacerbate racial and economic segregation between these spaces, specifically in northern metropolitan areas (Rusk, 2013; Bischoff, 2008;). Such spaces are fragmented into “hundreds of overlapping, autonomous political units (boundaries)” (Weiher, 1991, p. 4). Pennsylvania is considered the second most fragmented state in the country, second only
to Illinois (Maciag, 2012). Fragmented school district boundaries, such as in the Philadelphia metropolitan area, serve as blockades separating poor from rich and White from Black, intensifying the differential access to jurisdiction based resources such as public schools between these populations (Bischoff, 2008, p. 190).

Often the urban/suburban Maginot line reflects the geographic, economic, racial, and academic divisions between minority and White students. The typical trope acknowledges that White students attend “high quality” schools in affluent suburban communities while Black and Hispanic students attend resource poor schools in the inner cities (Rothwell, 2012; Lamb, 2005). Yet, recent studies show that a majority of minority and low-income populations now reside in suburban metropolitan communities (Frankenberg & Orfield, 2012; Berube & Kneebone, 2006; Frey, 2003). Even though suburban communities are no longer exclusively racially homogenized White spaces, and residential segregation within boundaries (micro-segregation) has declined, such improvements are offset by the increasing segregation between school district boundaries (macro-segregation) (Lichter, Parisi, & Taquino, 2015). These suburban municipalities and school districts are turning into divisible racial and economic enclaves.

So, who or what is the blame for these divisions? The federal courts currently blame consistent residential segregation and therefore school segregation on private practices and residential choices of families to choose certain suburban spaces over others—de facto segregation, and not intentional state action—de jure segregation (Rothstein, 2017; see Freeman v. Pitts, 1992; Parents Involved, 2007 (plurality)). But, putting all the blame on private residential decisions ignores our country’s history of pernicious explicit federal, state, and local policy that have geographically, economically,
and socially divided White and Black residential communities in metropolitan areas (Bonilla-Silva, 2017; Rothstein, 2014, 2017; Shapiro, 2017; Freund, 2007; Massey & Denton, 1998). Government actions include but are not limited to segregated public housing projects, racial zoning that created Black and Latino ghettos, federal subsidies for suburban development for White homeowners only, redlining, and racial steering (Rothstein, 2014a, p. 2; Satter, 2009; Lamb, 2005).

Even though the Fair Housing Act of 1968 have attempted to dismantle and invalidate the usage of discriminatory housing policies on the basis of race, color, religion, ethnicity, and disability; the law did not fix the generations of compounded economic and social inequities that gave Whites a leg up due to the wealth accumulation attributed in their access to suburban housing nor does it forbid suburban communities from excluding populations that cannot afford to live there (Shapiro, 2017; Rothstein, 2017; Bonilla-Silva, 2017).

Today, metropolitan divisions persist with use of covert, implicit, seemingly racially neutral policies and regulations, such as exclusionary zoning ordinances preventing low-to-moderate income populations from the suburbs (Rothstein, 2017; Bonilla-Silva, 2017). Furthermore, even though these current policies focus on income inequality, race still matters. Minorities and Whites are still steered into certain neighborhoods over others (Ross & Turner 2004; Charles, 2003; Galster, 1990; DeSena, 1994). Blacks and Latinos are frequently offered high-interest, subprime mortgages than Whites (Chen, 2012). Middle class Black families are still more likely to live in segregated lower income neighborhoods than Whites of the same income (Reardon, Fox, & Townsend, 2015). Race plays a significant role in the housing values of a residential
area. Predominately White, high socio-economic neighborhoods are more likely to accumulate in wealth; while Black and Latino neighborhoods are found to have greater home value decline and instability (Shapiro, 2017).

Racially and economically isolated school environments due to racially isolated residential neighborhoods have been known to harm the educational, social, and economic opportunities of students of color (Orfield, 2014). These schools are characterized as having less qualified teachers, higher teacher turnover, fewer rigorous courses and more remedial courses, and low student achievement (Orfield & Lee, 2005). Furthermore, Black and Latino\(^1\) students attend schools with more concentrated poverty compared to White students (Jordan, 2010). Yet studies have shown that a racially diverse and integrated school environment have been known to provide all students with the ability to work and learn from different populations with different perspectives, increase student and economic achievement, increase critical thinking skills, undermine stereotypes, and be more willing to live, work, and befriend students across racial lines (Orfield, 2014; Mickelson & Bottia, 2010; Killen, Crystal, Ruck, 2007; Wells & Crain, 1994).

The promises of integrated schools are often thwarted by systemic practices of past and present housing and education policies and practices. The existence of segregation and the persistence of discrimination is not natural law as our courts would accept, but is a product of state law. State action contributed to the harmful system of racial inequality that continues to divide and cut short the opportunities of low-income and minority populations. The government is therefore complicit to past and present private actions that segregate, such as private prejudice, White flight, racial steering and

---

\(^1\) Throughout the dissertation I use Latino and Hispanic interchangeably.
blockbusting, racially restricted covenants, and the wealth accumulation and differences between races (Rothstein, 2017; Freund, 2007).

**Purpose of the Dissertation**

Therefore, new studies are necessary to understand the process and the purpose in which fragmented metropolitan suburban communities and school districts have transformed demographically over time. Primarily, this dissertation argues that past and present housing and education policies of the suburban municipalities and school districts of this study play an integral role in limiting or expanding the choice of residents to access suburban communities on the basis of race and class. Such policies intensify school and residential segregation and inequality between jurisdictions. Secondarily, this dissertation sought to investigate the persistent harm in consistently defining quality suburban communities as White and affluent spaces, specifically in the wake of minority and lower-income demographic shifts to the suburbs. More narrowly this mixed method case study analyzed how housing and school district policies of two inner ring suburban school districts within an affluent county in the Philadelphia metropolitan area function together to impact the racial and economic demographic segregation between these districts.

To accomplish this purpose, I analyzed the housing and school policies of Lower Merion School District and Cheltenham School District located in Montgomery County, Pennsylvania between 1960 until 2014. Currently, Lower Merion School District is a predominately White and affluent community, while Cheltenham School District is racially and socioeconomically diverse. However, in 1960, both districts’ municipalities had a predominately White population (95-99%) and similar economic demographics.
Examining these two districts provided an insight to how divergent goals, cultural purposes, and implementation of housing and education policies have contributed to the demographic trajectory of each suburban jurisdiction.

To address this inquiry, I utilized archival records such as the US Census Bureau, American Community Survey (ACS), National Center for Educational Statistics’ (NCES) Common Core of Data, and maps to assess the demographic transformation within these jurisdictions over time. This dissertation utilized a variety of documents, interviews, and direct observations to assess federal, state, and local housing and education policies that contributed to the demographic shaping of each jurisdiction.

**Overview of the Dissertation**

The presentation of this dissertation is divided into nine chapters. Following this Introduction, the review of the literature first provides further context regarding the claim that de facto segregation is de jure segregation. I then investigate two themes in the research: the suburban construct as White spaces and the link between political fragmentation in metropolitan areas to education and residential segregation. I examine the literature related to creation of suburban areas for Whites only at the exclusion of minority groups, and the effects of that privilege on the segregation of suburban communities. Additionally, fragmented metropolitan areas are segregated because of past and present exclusionary actions of local jurisdictions focused on preserving White suburban communities. I used the political fragmentation literature as a theoretical framework to understand the choices, tactics, and policies of municipalities that contributes to the racial and economic segregation between suburban communities. This dissertation adds to the literature by assessing the role of policy in the demographic
segregation between northern suburban school districts and municipalities.

Chapter Three focuses on methodological choices and design. This dissertation is a sequential mixed method multiple embedded case study of municipality and school district policies of jurisdictions in Montgomery County, Pennsylvania (See Yin, 2014). Essentially, this case study compared the zoning, housing and school policies through a new metropolitan suburban history methodological framework as well as the demographics of Lower Merion and Cheltenham School District and the districts encompassing municipalities (Lower Merion Township, Narberth Borough, and Cheltenham Township) between 1960-2014 (See Dougherty, 2012; Lassiter, 2012). Data included archival data, housing and policy case law, laws, municipality and school district documents, newspapers, direct observation, as well as interviews with residents and former and present school and municipal leaders. I used temporal schemes, theories, and inductive analysis methods such as thematic coding and memos to analyze the data.

Chapter Four discusses the federal and Pennsylvania context to examine the role, power, relationship, and limitations of counties, local municipalities, and school districts to enact policies to promote socioeconomic and racially diverse communities or sustain segregated communities. I argue that Pennsylvania’s progressive anti-exclusionary zoning fair share doctrine and de facto segregation policy provides opportunity to remedying segregation in metropolitan areas; however, the current implementation of these policies diminishes their effectiveness.

Chapter Five through Eight presents the findings. Chapter Five examines the lack of demographic changes of Lower Merion Township and Narberth Borough, and the zoning and housing policies of Lower Merion Township that contributed to why and how
these jurisdictions stayed relatively White and affluent throughout its history. Lower Merion’s Main Line culture of affluence and Whiteness led to zoning and housing decisions that created a complex system of buffers that excluded minority and middle-to-lower income populations from the Township. Chapter Six argues that the Lower Merion School District operates within the confines of the municipality shaping of the boundaries. School district operates as passive and active arbiters of the exclusive development of the municipality boundaries. Yet, the School District has recently sought to reach beyond the confines of the narrative to address issues of inequalities within the district.

Chapter Seven examines the racial and economic demographic transformation of Cheltenham Township, and the Township’s zoning and housing policies that contributed to why and how it became racially and socioeconomically diverse. I argue that Cheltenham Township did practice policies of exclusion, but it did not create effective physical and economic buffers to stem against a demographically changing Philadelphia jurisdiction. The changing demographics in Cheltenham led to a diverse narrative that impacted how other jurisdictions and populations perceive its boundaries. In Chapter Eight, I argue that the Cheltenham School District operates within the confines of the municipality shaping of the boundaries. Cheltenham School District also operates as passive and active arbiters of the diverse development of the municipality boundaries. Due to the constant demographic changes in the Township, the Cheltenham School District had to quickly develop diverse policies that would integrate its curriculum and schools.
Chapter Nine presents the discussion of the dissertation. Chapter Nine first conducts a comparative analysis of Lower Merion and Cheltenham zoning, housing, and school policies through the politics of exclusion and political boundaries framework. The study elicited three findings: 1.) Narratives matter; 2.) Municipalities create boundaries and schools reinforce the cultural narrative of municipalities; and 3.) The perception of quality suburbs as White spaces allows segregated school and communities to persist. I argue that to truly create effective racially and socioeconomic diverse and integrated schools we must challenge the suburban narrative that promotes White and affluent school districts as quality school districts. Finally, I examine various policy recommendations for federal, state, and local policymakers to invalidate de facto segregation and promote diverse integrated communities.

**Personal Journey to the Suburbs: Complexity of Choice**

My middle class Black family in the 1990s made the move from our grandmother’s row home in Germantown, a predominately Black northwest Philadelphia neighborhood, to our own large single-family home on a tree lined street in Cheltenham Township. Cheltenham Township was a diverse suburban community about ten minutes away. My parents’ motivation for the move was to make sure that their two young children would have access to more space and the best education that the city of Philadelphia could not provide. Before settling on Cheltenham, they looked at 63 homes in 10 different suburban municipalities out of the 234 suburban municipalities surrounding the city of Philadelphia in Pennsylvania. The drive in and across the Philadelphia boundary line proved to be extremely significant in terms of changing the residential, educational, and cultural landscape, outlook, and outcomes for my family.
I use this story to situate myself in this study and to illustrate the complexity and essential fallacy in “choosing” one suburban community out of hundreds of options. Residential and educational choice in a fragmented metropolitan area does not necessarily depict the way in which municipalities and school districts construct cultural, political, and physical boundaries and compete to obtain the residents to fit within that jurisdiction. The question is not necessarily why my parents chose Cheltenham Township over other spaces, but rather what jurisdictions provided the environment to accommodate, accept, and even allow my Black middle-class family to entertain their option of choice? Furthermore, what environments created the conditions that stalled their choice?

This dissertation sought to unpack the conception that residential segregation and school segregation between suburban communities is due to private residential decisions but is instead, the result of a complex array of discriminatory and racially neutral housing and school policies that determines who can access what and who cannot. This inquiry matters because if we can remove the governmental stumbling block that consistently allots residential segregation or de facto segregation as separate from de jure segregation, we can create and implement beneficial policies to invalidate both. We can hold school districts and municipalities accountable to create more equitable jurisdictions that truly integrate and heal racial divisions in communities. We can truly address the systemic racism that is embedded in our metropolitan areas and suburban communities.
Chapter Two

Review of the Literature

Introduction

To better understand the role of policy in the increasing demographic shaping and segregation between northern metropolitan suburban school districts I examined two themes: the suburban construct as White spaces and the link between political fragmentation in metropolitan areas to education and residential segregation. To do so, I first provide context regarding my main argument, that de facto segregation is de jure segregation by addressing past and present federal education and housing jurisprudence and policies that contributed to the racial and economic segregation of peoples in metropolitan areas. I then examine the literature related to the creation, effect, and perpetuation of White Privilege in suburban areas. Additionally, I assess the political fragmentation literature to understand how fragmented jurisdictions and political boundaries act as race-based mechanisms to perpetuate segregation. Finally, I lay out the goals and research questions of the dissertation.

Background: De Facto is De Jure Segregation

The existence of de facto segregation or residential segregation is often blamed not on state action but on private decisions (Rothstein, 2017; Parents Involved, 2007; See also Freeman v. Pitts, 1992; Milliken v. Bradley, 1974). Grounding this dissertation is the repudiation of that claim. I argue that de facto segregation in schools, established by the basis of residential segregation are products of intentional governmental
discriminatory policies or de jure segregation in housing and education that geographically divided communities on the basis of race, ethnicity, color, religion, and income (See Rothstein, 2017). To provide context for this argument I discuss the creation of the suburbs along racial and class lines by the government, the trajectory of discriminatory housing and school policies and the role of the courts to maintain residential and education segregation.

**Government Policy Creates Racially Segregated Suburbs**

The suburb is the creation of the federal government (Freund, 2007, p. 11). The federal government through mortgage programs and tax incentives made suburban homes affordable (Silver, 1997; Mohl, 1997). Federal and state spending priorities and urban renewal policies created parks, schools, and other services that made suburban communities enviable (Freund, 2007). Roadway construction in the age of automobiles linking the cities to suburban areas made the suburbs accessible (Freund, 2007). Such federal programs transformed the metropolitan space. Yet, these suburban benefits existed almost exclusively for Whites (Freund, 2007, p. 11; Rothstein, 2014, 2017). Blacks and other ethnic minorities were excluded from suburban communities for decades, often at the specifications of federal policy (Mohl, 1997).

The federal government, not just private preferences in racial differences, perpetuated the principle that racial exclusion was necessary for a healthy suburban housing market, thus connecting the practice of racial discrimination with economic advantages (Freund, 2007). Even though civil rights legislation in schools and housing has attempted to curb the practice of discriminatory racial policies, this principle that suburban communities are exclusively for the economic and social benefits of Whites
only continues to exist (Shapiro, 2005, 2017; Rothstein, 2017). To address this claim, I will discuss the history and trajectory of governmental sanctioned housing and school discriminatory policies in the US.

Government actions such as racial and exclusionary zoning, the subsidization of the suburbs for Whites, segregated public housing, and the validation of discriminatory private actions by real estate entities allowed metropolitan areas to be racially and economically segregated. The use of residential and housing policies to segregate is argued to be a product of the industrialization of the north in the early 1900’s (Massey & Denton, 1998). This process shifted the focus from a rural to a burgeoning urban workforce. Industrialization brought concentrated row houses near factories, pollution, and a diverse workforce, which included new immigrants and Blacks from the South to these urban centers (Massey & Denton, 1998).

Beginning in the early 20th century, cities enacted zoning ordinances to combat urban congestion and urban ills. Zoning is a tool used by municipalities to divide the property according to “acceptable” uses, structures, dimensional aspects, aesthetics, as well as determine who can live where and with whom (Dukeminier, Krier, Alexander, & Schill, 2010, p. 941; See Euclid v. Amber Realty, Co., 1926). Zoning also became a tool to protect property values and exclude “undesirables” such as ethnic minorities and immigrants (Silver 1997, p. 1; Massey & Denton, 1998). This often meant that minority groups were confined and relegated to segregated neighborhoods through racial ordinances in 1910 (Massey & Denton, 1998; Silver, 1997). The Supreme Court eventually invalidated the use of such ordinances seven years later in the pivotal case of Buchanan v. Warley (1917). The Court held that local racial zoning ordinances denying
housing to Blacks in White neighborhoods violated the due process rights of White property owners to sell to Black buyers.

After Warley (1917), cities pushed for spot zoning, allowing cities to intrude into Black neighborhoods and establish a use classification system inconsistent with the surrounding area, thus reducing the value of the land and property (Dukeminier et al., 2010; Silver, 1997). For example, municipalities declared certain Black residential areas as industrial to use the land for landfills and drug rehabilitation units (Rothstein, 2013; Ritzdorf, 1997).

During the 1930s through the 1960s, New Deal federal governmental agencies such as the Federal Housing Administration (FHA) and the Veterans Administration (VA) subsidized the White migration to the suburbs. In 1943, the FHA financed 80% of all private home construction and mortgages throughout the United States, propelling the rise of suburban communities for Whites only (Rothstein, 2014a, p. 16; Hirsch, 2000). In addition, the FHA utilized color codes to identify neighborhoods that would receive federal aid and those that would be excluded (Madrigal, 2014). All White neighborhoods were coded green while the FHA would instruct appraisers to deny economic aid to those communities coded red or redlined representing Black neighborhoods (Kahlenberg, 2017; Madrigal, 2014). Ta-Nehisi Coates (2014) writes, “Redlining destroyed the possibility of investment wherever black people lived.” Charles Abrams (1955), lawyer and urban planner, stated, “the FHA set itself up as the protector of the all White neighborhood and became the vanguard of [W]hite supremacy and racial purity” (quoted in Mohl, 1997, p. 66). The Fair Housing Act of 1968 ended the FHA policy of the all-out suburban exclusion of Blacks.
Along with the subsidization of the suburbs for Whites, the Public Works Agency (PWA) initially constructed public housing benefiting lower-middle class White families (Mohl, 1997). After the Housing Act of 1949, developers and local authorities began constructing segregated public housing (Mohl, 1997). Eventually, urban public housing became predominantly occupied by low-income and minority tenants, mainly because middle class White residents had governmental help to migrate from the city to the suburbs (Edson, 2011, p. 3). Presently, state public housing authorities continue to prioritize public housing in urban, low-income minority areas instead of integrating suburban communities (Rothstein, 2015; See Texas Department of Housing and Community Affairs (TDHCA) v. The Inclusive Communities Project, Inc. (ICP), 2015).

As middle to upper class White populations escaped to the suburbs from the inner city, suburban municipalities employed land use policies to raise housing values to guard against poorer city populations from accessing the suburbs (Mangin, 2014). The employment of exclusionary zoning policies prevented the construction of multiple forms of housing to control the economic value of housing, land, and types of people within a municipality (Rothstein, 2017; van Baaren, 2017). Municipalities strive to have larger lot sizes and to build larger single-family homes to increase the value of such homes (Mangin, 2014; Rothwell, 2012; Shuster, 2011). Smaller lot sizes reduce housing prices, allow for more residents, and make housing more affordable (Orfield & Luce, 2010; Fruend, 2006). Zoning devices impeding the number of multifamily dwellings and mobile homes make it difficult for low-income and minority families to access prime suburban school districts (Bischoff, 2008). Exclusionary zoning policies are currently legal and utilized in many states and municipalities across the country (Mangin, 2014).
The federal government created the framework in which the exclusion of minorities was a property right of suburban homeowners (Freund, 2007). The real estate industry with assistance by governmental policies incited fear among White homeowners over the existence of Black homeowners. Whites feared that Black homeowners would decimate the economic and social wealth of White homeowners (Satter, 2009; Mohl, 1997). Home wealth accounts for 60% of the total wealth among the middle class (Shapiro, 2005). Such practices included enacting private restrictive covenants in residential zoning codes and private deeds, preserving the transition of property to other White people (Rothstein, 2014a). The Supreme Court initially upheld the practice of restrictive covenants in the 1926 case *Corrigan v. Buckley*. The Court held that the covenants were private contracts and not subject to the Constitution (*Corrigan v. Buckley*, 1926; See Kahlenberg, 2017). The Court eventually invalidated racially discriminatory covenants in the case *Shelley v. Kraemer* (1948). Furthermore, police actively enforced restrictive covenants by pushing minorities out of their homes (Kahlenberg, 2017). Police inaction allowed other homeowners to use violence to drive out minority homeowners in the suburbs (Kahlenberg, 2017; Satter, 2009; Massey & Denton, 1998).

Real estate speculators also engaged in blockbusting. Rothstein (2014) defines blockbusting as the practice by real estate speculators to convert inner ring suburbs from White to Black by encouraging Blacks to find homes in White communities thus creating hysteria among White homeowners to sell their homes quickly at reduced prices. Speculators would then buy the homes at reduced prices and resell them at highly inflated prices to Blacks (Rothstein, 2014, p. 25; Satter, 2009; Massey & Denton, 1998). Even though blockbusting and racial steering is currently illegal under the Fair Housing Act of
1968, real estate agents continue to engage in racial steering (Ross & Turner 2004; Charles, 2003; Galster, 1990). Racial steering directs clients toward a particular neighborhood or away from others to “distort” the housing demands and racial spatial patterns of White and minority homebuyers, perpetuating segregation (Rothstein, 2014; Galster, 1990, p. 39). What is invidious about this practice is that real estate agents can steer populations on the basis of race without ever mentioning race.

Current discriminatory actions persist such as reverse redlining or predatory lending, where Blacks are pushed into high-risk interest loans (Rugh, Albright, & Massey, 2014; Hyra, Squires, Renner, & Kirk, 2013; Squires, 2004). Studies also reflect that real estate entities engage in linguistic profiling, which takes place when callers inquiring about the accessibility of housing are not informed of opportunities if the callers speak in a “black accent” (Massey, 2015; Squires and Chadwick 2006; Fischer & Massey 2004; Massey & Lundy 2001; Purnell, Idsardi, & Baugh 1999).

These discriminatory practices and have helped to shape the restrictive and exploitative housing conditions and educational opportunities for low-income and minority populations. Minorities, specifically Blacks, were hemmed in and constrained in unwanted run-down ghettos (Rothstein, 2014a; Massey & Denton, 1998), because they were barred from accessing housing in other neighborhoods. Black neighborhoods received less city protections and resources, such as fire protection and trash pick up (Rothstein, 2014a). Employment opportunities moved away from city centers to the suburbs. Minorities lost jobs because they could not afford to or were blocked from moving to the suburbs, or they incurred extremely high transportation costs getting to and
from work (Rothstein, 2014a). To access housing, they paid higher rents and mortgages than Whites, because of their greater demand for housing (Rothstein, 2014a).

Discriminatory housing policies created the residential segregation framework that geographically divided populations by race. But discriminatory education policies of school districts further solidified these divisions by segregating schools by race thus impugning the educational opportunities of minority children, promoting White schools and students as superior, and utilizing existing residential segregation patterns to maintain school segregation in schools (Orfield, 1969). The Supreme Court in the 1950s, 60s and 70s attempted to invalidate segregation in schools, but it has chosen to allow residential segregation to segregate schools (Brown v. Board of Education, 1954; Green v. County Board of New Kent County, 1968; Swann v. Charlotte-Mecklenburg Board of Education, 1971; Keyes, 1973; Milliken, 1974; Dowell, 1991; Freeman, 1992; Parents Involved, 2007).

**Education Jurisprudence Maintain Residential and Education Segregation**

The Supreme Court has recognized in their Fourteenth Amendment Equal Protection Clause (EPC) education jurisprudence that housing segregation intersects with school segregation. Beginning with the pivotal Brown v. Board of Education (1954) decision, holding that segregation on the basis of race in schools is inherently unequal, the Court has gradually wrestled with the complexities associated with desegregating schools in segregated residential communities.

In Swann (1971), the Court recognized that discriminatory school district policy decisions combined with existing residential segregation, based on neighborhood zoning policies, proliferated school segregation. The Supreme Court allowed the district court to
force unwilling school districts to adopt certain equitable remedies such as racial quotas, redistricting, busing, and the construction of new schools to effectively desegregate schools that serve racially segregated neighborhoods (Swann, 1971, p. 22-25). The Court opined that the location and construction of new schools determines the racial composition of the student body in each school within the district. Moreover, the location of good schools attracts populations to communities and influences the development of residential communities (Swann, 1971).

Two years later, the Court in Keyes v. School District No. 1, Denver, Colorado (1973), held that the school board in the city of Denver, Colorado practiced de jure segregation by employing techniques that manipulated school attendance zones, school site selection and construction, neighborhood school attendance policy (p. 198). As addressed in Swann (1971), these practices helped to segregate the schools throughout the district, because they took advantage of existing racial residential segregation patterns of neighborhoods that determined student populations of schools (Keyes, 1973).

However, the Court in Keyes differentiated between de jure segregation and de facto segregation, holding that only policies that intentionally segregate on the basis of race, “de jure” segregation violate the EPC. De facto segregation, based upon the demographic and racial patterns of students in a particular neighborhood do not violate the EPC absent a showing that the imbalance was brought by state actors (See Swann, 1971, p. 17-18; Keyes, 1973, p. 203; Reutter, 1982). Dissenting, both Justice Douglas and Justice Powell found no such distinction between de facto and de jure segregation, because they are both caused by discriminatory state action and policies (Keyes, 1973, p. 215).
One year after *Keyes*, the Court began to issue decisions that impeded school desegregation of metropolitan areas. The Court in *Milliken v. Bradley* (1974) found that it was improper to impose a multidistrict remedy for de jure segregation in Detroit, Michigan absent a finding that the suburban districts engaged in de jure racial segregation. The dissent argued that without the suburbs, integration of urban schools becomes almost impossible to accomplish, because the city schools are majority Black, while the outlying suburbs are majority White. A Detroit only program would only increase White flight to the suburbs (*Milliken*, 1974, p. 803).

In *Freeman v. Pitts* (1992) and *Board of Oklahoma City v. Dowell* (1991), the Court began to withdraw District Court oversight in segregated school districts that historically practiced de jure segregation. The Court attributed existing school segregation in DeKalb County, Georgia on demographic shifts, “de facto” segregation, holding that the school districts put forth a good faith effort in creating a unitary system (*Freeman*, 1992). Denoting these demographic shifts to work opportunities attracting Blacks to DeKalb County and Atlanta, the construction of a new interstate connecting Atlanta to DeKalb, and the low birth rates of White families compared to Black families (*Freeman*, 1992, p. 480). Thus, the Court blamed the re-segregation of schools on private decisions of families and the marketplace, discounting any role educational or housing policies might have played in exacerbating school and residential segregation. Busing as a successful integrative tool to mitigate the condition of residential segregation was also abandoned (*See* Milby, 1996; Applebome, 1992).

In the most recent Court decision regarding K-12 school desegregation, *Parents Involved* (2007), the Court struck down voluntary integration plans, which relied on racial
classifications to integrate de facto segregated schools in Seattle, Washington and Jefferson County, Kentucky. Chief Justice Roberts concluded that the neighborhoods in Louisville and Seattle remained segregated due to private choices. Actions by school districts to reverse their own segregation through voluntary integration plans are therefore unconstitutional (See Rothstein, 2017). The plurality opinion made two controversial pronouncements that have battered the remediation of de facto segregation. First, diversity in schools is a compelling government interest that only applies to higher education institutions and not to K-12 schools (Parents Involved, 2007, p. 724-725; Grutter v. Bollinger, 2003, p. 324). Justice Kennedy disagreed with this contention in his concurrence, arguing that school authorities concerned with the racial composition of their student body should be free to devise race conscious measures to address diversity, such as “strategic site selection of new schools; drawing attendance zones with general recognition of the demographics of neighborhoods; allocating resources for special programs; recruiting students and faculty in a targeted fashion; and tracking enrollments, performance, and other statistics by race” (Parents Involved, 2007, p. 789).

Second, Chief Justice Roberts seemingly acquiesced to continued existence of segregated schools when he wrote:

“Before Brown, schoolchildren were told where they could and could not go to school based on the color of their skin. The school districts in these cases have not carried the heavy burden of demonstrating that we should allow this once again — even for very different reasons. ... The way to stop discrimination on the basis of race is to stop discriminating on the basis of race.” (p. 748).

Chief Justice Robert’s perspective was shaped from a colorblind perception of the constitution, interpreting Brown to consider all forms of racial classification as
discriminatory, even if the districts’ use of race was to make true *Brown*’s purpose to invalidate racially segregated schools (Turner, 2015).

I focus on the Supreme Court because it has been one of the most influential forums in the fight for the constitutional rights of minority populations within the second half of the 20th century (Somin, 2016). Yet, our Court’s acceptance of “de facto” segregation has allowed segregated schools and the inequities between student populations to proliferate. The case law also substantiates an urban focused understanding of school segregation. The suburbs were intentionally overlooked as a cause of segregation and as a remedy to desegregate (*See Milliken*, 1974; Orfield, 2001b).

**Perpetuation of White Privilege in Suburban Areas**

Our Supreme Court’s invalidation of de jure segregation only merely addressed the outward blatant action of discrimination and racism. But de jure segregation as the Supreme Court decisions purports does not address the structural systemic nature of segregation. Structural racism is defined by Bonilla-Silva (2017) as “a network of social relations at social, political, economic, and ideological levels that shapes the life chances of the various races” (p. 18). By creating and providing the economic and social incentives and mandates to maintain the suburbs for Whites only, the federal government has perpetuated the condition where the value of suburban communities and structures is determined through a White lens (Freund, 2007; Bonilla-Silva, 2010). Bonilla-Silva argues that

[r]acial structures remain in place as actors who identify as White, part of the dominant race—receive material benefits from the racial order, they struggle to maintain their privileges. Those of the ‘subordinate’ race struggle to change their status quo or become resigned to their position. They exist to maintain the dominant race. The dominant race tends to become the master of the frameworks, the frameworks of the dominant
race tend to become the master frameworks upon which all racial actors ground (for or against) their ideological positions.” (2010, p. 9)

Wells & Crain (1997) in their study examining the impact of an interdistrict federal desegregation order in St. Louis, Missouri recognized how rooted race is within our systems, even in the invalidation discriminatory practices.

Most civil rights legislation and court cases focused on giving African Americans the same opportunities as whites to achieve in a white-dominated society. Under such policies, blacks were suddenly unshackled and then expected to compete in a contest in which whites had a 200-year head start—a contest for which whites had written the rules and constructed the meaning of merit on their own terms. (p. 2)

Whites received benefits from discriminatory housing and education policies, and such policies have made them the “master of the frameworks” or institutions that continue to benefit White populations and disadvantage minority populations. Bonilla-Silva (2017) indicates that for racial minorities discrimination is structural and pervasive while Whites view it as private discrimination (Bonilla-Silva, 2017). US Supreme Court decisions in Milliken, Freeman, and Parents Involved, holding that existing discrimination is a private issue and condition, pronounces an ahistorical and acontextual view on existing forms of segregation and protects White privilege (Turner, 2015). Failure to address de facto segregation shows an unwillingness to grapple with why these preferences exist, and the role of the governmental structures that discriminatorily impacts the life trajectories of minority populations (Turner, 2015; See Justice Sotomayor’s dissent in Schuette v. Coalition to Defend Affirmative Action, 2014).

These racially charged discriminatory practices gave Whites a leg up to accumulate wealth in their houses, while systematically excluded Blacks and other minorities from that same privilege (Shapiro, 2005, 2017). Whites were able to pass
down wealth assets from generation to generation so their children could buy into affluent suburban school districts (Shapiro, 2005, 2017; Masnick, 2001). For example, in a 2013 study on wealth, White families median net wealth was $142,000, equated to $11,000 for Black families and $13,700 for Latino families (Shapiro, 2017, p. 226-228).

Wealth accumulation not only provides the gateway to better housing, neighborhoods, schools, and health, but also serves as a protection from life’s setbacks such as “[u]nemployment, medical emergencies, disability, decimated savings, tuition costs, depleted retirement accounts, a job far from home, homeschooling out of necessity, family stress, and separation” (Shapiro, 2017, pp. 487-489). Without the cushion of wealth, lower to middle class Black families are less likely to move up economically from one generation to the next. According to Shapiro (2017)

Half of blacks (50%) raised at the bottom of the family wealth ladder remain stuck there as adults, compared with only a third (33%) of whites. More than two-thirds of blacks (68%) raised in the middle fall to the bottom two rungs of the ladder as adults compared with just under a third of whites (30%). Only 23 percent of blacks raised in the middle surpass their parents’ family wealth compared with over half (56%) of whites. African Americans tend to get blocked at the bottom, while whites at the top stay put”. (Chapter 1, p. 550-554 (Kindle Edition))

Moreover, even when minority and White populations have equal income statuses, racial segregation still exists within housing (Belfield & Levin, 2007; Darden, 1990). Reardon, Fox, & Townsend (2015) have found that among White and Black families with similar incomes, Whites are more likely to live in neighborhoods with quality schools, while Blacks live in distinctly lower income neighborhoods (See Shapiro, 2017; Sharkey, 2014). In a 2014 study, middle class Black households making $100,000 or more annually was found to live in neighborhoods with similar disadvantages as Whites making less than $30,000 per year (Sharkey, 2014). Investigating segregation within
housing and schools requires an equal analysis of both wealth and racial discrimination (Shapiro, 2017).

This privilege extends to school and neighborhood perception. Suburban school districts compete to attract the “best families for their fiscal health” (Dougherty, 2012). Yet the consideration of the “best families” tends to be White. The perception of school quality for White families is tied to the race and class profile of that school and neighborhood; therefore, parents tend to avoid schools and areas with urban like demographics to avoid urban like problems, such as poor schools (Orfield, 1997, p. 172).

In a 2008 study, researchers tested the proposition that racial composition of a neighborhood influenced Whites perceptions of neighborhood quality. They found that Whites positively viewed all White neighborhoods higher than mixed race neighborhoods, and had a negative assessment of all Black neighborhoods (Farley, & Couper, 2008). White families tended to believe that the existence of minority students brought down the quality of schools and neighborhood (Shapiro, 2005).

Such beliefs are substantiated when housing prices fluctuate depending on the number of minority populations. For example, in a study of Connecticut’s housing prices from 1994-2004, higher home prices were reported in school districts with fewer Hispanics (Clapp, Nanda, & Ross, 2008). In Pennsylvania, grants are more likely to go to affluent and developing areas than older more diverse municipalities (Katz, 2007). Diverse suburban school districts are more likely to enroll students from low-income and minority families. Low-income students are more expensive to educate and therefore fiscal municipality and school district pressures drive increasing property taxes and drive out established homeowners (Dougherty, 2012).
Whites are therefore more likely to stay in predominately White or move to predominately White communities, where Black families are less likely to move out of integrated or mixed communities (Shapiro, 2005). White students are the most segregated in schools dominated by their own group and that White isolationism is intended, and purposeful as to monopolize and increase the competitive opportunities within their own race (Orfield, 2001a).

This literature review iterates two contentions. First, the federal creation of the suburbs was for the economic and social benefits of Whites, excluding minority and low-income populations. Even after recent demographic shifts of minority and low-income communities to the suburbs, the value of suburban communities still reflects a White preference. Second, state action in the form of education and housing policies were utilized to segregate communities on the basis of race and income. Even after the passage of beneficial civil rights legislation and judicial decisions that has helped to invalidate de jure segregation, the validation of de facto segregation created by state action in housing and school policies continues to divide communities on the basis of race and income. The next section of the literature review specifically investigates the role of geographic boundaries as a physical, cultural, and economic tool for local municipalities to maintain segregation on the basis of race and class.

**Political Fragmentation Theoretical Framework**

The role of policy—federal, state, and local, plays a powerful role in creating and maintaining economic and racial divisions in suburban areas. I used the political fragmentation literature to serve as a theoretical framework to understand how multiple metropolitan communities proliferates racial and economic segregation. Further, the
jurisdictional sorting theories of the fragmentation literature provide the frame to address
why and how these individual municipalities use policies (discriminatory and racially
neutral) to exclude or include populations.

According to the U.S. Census Bureau, in 2012 there were 89,004 local
governments, 3,031 counties, 19,522 municipalities, 16,364 townships, and 12,844
independent school districts in the United States, signifying that there are numerous
autonomous jurisdictions (See Maciag, 2012). Spatially, school district boundary lines
overlay and serve as municipal/local boundary lines in Pennsylvania. These autonomous
jurisdictions, specifically northern metropolitan areas are highly fragmented with distinct
racial, economic, political, and social compositions (Orfield & Luce, 2010; Shapiro,
2005; Orfield, 1997). Research shows that highly fragmented school district boundaries
often play a role in exacerbating school and residential segregation between boundaries
(Orfield, M & Luce, 2010; Frankenberg, 2009; Powell, 2009; Bischoff, 2008). This
section of the literature review defines political fragmentation, the link between
fragmentation and segregation, and jurisdictional sorting models.

Defining Political Fragmentation

Political fragmentation is defined as the “proliferation of governments across
American society and geography. It denotes the division of urban areas among hundreds
of overlapping, autonomous political units, each with an array of powers—regulation,
taxation, incarceration, program, implementation, and allocation of public resources”
(Weiher, 1991, p. 4). Such proliferation of governments, specifically local governments,
is a testament to our early democratic identity, where the American people were
encouraged to form local governments to carry the burden of training citizens to
participate in a democracy, provide public services, and protect the rights of individuals (Weiher, 1991; Teaford, 1979; Danielson, 1976). This type of governance grants more control to localities and shifts it away from a central government. This concept of local control also impacts the proliferation of local school districts, where the state has delegated educational authority to these districts (Cohen & Spillane, 1992). Local policy and decision makers are considered to be the best at understanding the specific needs on behalf of students living within the district (See Land, 2002).

The proliferation of fragmented local municipalities and school districts illuminates concerns as to equality and efficiency in the distribution of resources across multiple jurisdictions (Teaford, 1979). Political fragmentation also proliferates the formation of distinct cultural, economic, and demographic identities entrenched in each space (Weiher, 1991). These distinct identities housed in these geographic and political units create incentives to protect the political and cultural power of each space, hoard resources, and propel exclusion (Teaford, 1971; Weiher, 1991).

**Suburban Political Fragmentation and Segregation**

Current literature addresses fragmentation pertaining to segregation between metropolitan areas that extends past the urban/suburban binary, referring to segregation between suburban jurisdictions. For example, the emergence of new school districts in Jefferson County, Alabama led to increasing school segregation due to racial differences across jurisdictional boundary lines (Frankenberg, 2009). Consolidation was found to decline Black/non-Black racial segregation (Clotfelter, 2004). Evidence also exists that students are equally segregated in metropolitan areas with greater and lesser self-sorting choices among school districts (Hoxby, 2000).
Recent demographic shifts to the suburbs have also intensified the racial and economic polarization between suburban communities and their school districts. These shifts have led to literature categorizing suburban communities by geographic location, age of housing, race, and income. For instance, in an examination of the Twin Cities metropolitan area (Minneapolis and St. Paul), suburban communities were divided into four distinct typologies by fiscal conditions and geographic location (Orfield, 1997). These categories linked to racial and economic characteristics of suburban jurisdictions geographically depict where minority and lower income populations are accessing, and which areas they are not.

Inner ring suburbs are defined as being located contiguous with or adjacent to a central city where more than half of housing was built before 1969 (Hanlon, 2010). They can be characterized as wealthy, elite, ethnic, middle class, declining, and in crisis (Hanlon, 2010). Inner ring suburbs are typically characterized as being in states of rapid economic decline and racial transformation, emanating conditions from the central cities (Orfield, 1997). Such racial transition took place from 1980-2000 (Hanlon, 2010). About 2/3rd of the suburban communities that are in socioeconomic crisis, with high concentrations of poverty, are typically inner ring suburban communities (Hanlon, 2010). Inner ring communities are considered to be ill equipped to handle such rapid diversification (Orfield, 1997, p. 30, 47-48).

Mid-developing suburbs or diverse second ring suburbs are characterized as undergoing rapid development and containing inexpensive housing, but offer few basic public services. These areas are also rapidly diversifying both economically and racially (Orfield, 1997, p. 33, 50). Commercial and residential high-tax capacity suburbs are
regions with an affluent property tax base, healthy commercial growth, low crime, low minority population, low poverty, and a growing student bodies (Orfield, 1997, p. 33-34, 52).

The structure of metropolitan areas can also facilitate greater diversity or segregation. For example, 137 metropolitan areas were divided into two types, elastic or “Big Box” regions and inelastic or “little box” regions (Rusk, 2013). “Big Box” regions have expanded core cities and larger countywide school districts. “Big Box” regions also facilitate greater socioeconomic and racial diversity and integration. “Little box” regions are defined as areas where the core populous and school system is trapped by inflexible boundaries and surrounded by a mosaic of suburban municipalities and school districts. The inflexibility of the boundary structure of little boxes regions has greater racial and socio-economic segregation (p. 5). “Little box” regions are often found in older northeast and Midwest metropolitan areas (See Bischoff, 2008).

These studies exemplify the need to understand the nature of fragmentation and increasing segregation between northeast inner ring suburban communities. These studies do not necessarily discuss how local policies, laws, and practices cultivate the cultural, political, economic, and racial identities employed to segregate suburban areas. Due to this need, this dissertation discusses the creation and implementation of local policies used to segregate suburban areas.

**Jurisdictional Sorting Models Explain the Segregation Between Areas**

There are four major models that help explain the demographic transformation and segregation between multiple jurisdictional boundaries: public choice model, politics of exclusion, neighborhood tipping, and political boundary. I will discuss each model
before settling on the politics of exclusion and political boundary models as the preferable framework for this dissertation.

**Public choice model.** The public choice model articulated by Tiebout (1956) claims that multiple jurisdictions, delineated by political boundaries each with an array of public goods, imposes a market structure in which people choose jurisdictions which closely match their ideal package of public goods. This theory discounts the way people make social decisions, including considering the racial composition of the neighborhood and schools to choose certain jurisdictions over others. It is believed that school quality for White families is partially measured by the race and class profile of that school and neighborhood (Shapiro, 2005; Orfield, M., 1997). The theory also assumes that individuals understand the full bundle of services available in each of the 234 jurisdictions within the Philadelphia metropolitan area and compares them to decide on where to live (Scott & Corzine, 1971).

**Neighborhood tipping model.** The neighborhood-tipping model contends that once the proportion of minority populations within a spatial unit reaches a certain point, the once homogeneous jurisdiction will irreversibly transition into a minority jurisdiction (Weiher, 1991, p. 21; Massey & Mullan, 1984; Schelling, 1978; Steinnes, 1977). At the forefront of the model are the perceptions and preferences of Whites within each spatial unit:

Whites have varying thresholds of toleration for blacks in their residential unit. As blacks move into the unit, Whites with the lowest levels of tolerance move out, making more vacancies into which Blacks can move. When Blacks move into these vacancies, those who would have remained in the unit at the original level of Black occupancy rethink their commitment, and some of them move, creating further vacancies. (Weiher, 1991, p. 13)
Unlike the public choice model, the tipping point model is clear on how racial and socioeconomic demographics influences one’s perception of the services and goods confined in each jurisdiction. The tipping model seems to hold that integrated jurisdictions are not stable, with integrated communities eventually deteriorating into majority minority communities. The tipping model’s focus on the preferences of residents to live in homogeneity areas fails to assess how policies by jurisdictional actors contribute to the demographic shaping of each jurisdiction (Weiher, 1991).

**Politics of exclusion model.** The politics of exclusion model claims that homogeneous communities use political boundaries and enact policies to prohibit low-income and minority populations from entry (Danielson, 1976; Schneider, 1984; Weiher, 1991; Bischoff, 2008). The exclusionary process is reflected in a series of steps (Danielson, 1976). The first step is to reinforce community identity and competition through the political process of incorporation, which gives the community jurisdiction over land use mechanisms such as zoning, development, taxes, and provision of public services (Danielson, 1976). Disparities exist between suburban jurisdictions because fragmented jurisdictions compete with one another for economic and social benefits from developers, governmental entities, property taxes, and potential homeowners (Katz, 2007).

The second step involves invoking federal, state, and local policies that would be utilized to exclude various groups or communities. As previously discussed, discriminatory housing policies such as the subsidization of mortgages in the suburbs for Whites only, location of public housing in the inner cities, restrictive covenants, violence, blockbusting, and racial steering maintained the exclusivity of the suburbs (Lamb, 2005;
Freund, 2007; Rothstein, 2013). DeSena (1994) addressed the use of informal tools and tactics of a predominately White middle-class community in Brooklyn, New York to keep out the growing Hispanic community. The politics of exclusion model invokes competition even in the act of exclusion. If one space is successful at excluding unwanted populations there are others that are not as successful (Weiher, 1991).

Politics of exclusion is depicted as incomplete since it does not describe the way that communities attract or recruit new residents (Weiher, 1991). I argue that the process of exclusion also serves as a recruitment tool. If minorities are excluded from certain suburban areas, but are allowed in others, then those areas are in turn recruiting minority populations. In reverse, if minorities are excluded from other suburban areas, it can be used as a signal to White populations who desire a homogeneous focused community to choose those communities. What the politics of exclusion model fails to address is the role of schools or other public goods to exclude.

Analogous to the politics of exclusion model is the urban planning theory, planning for control, which advances planning/policy goals of municipalities for social oppression and inequities (Yiftachel, 1998). This theory serves a practical and notional function determining how and why municipalities exclude. The planning for control theory is understood in four dimensions: territorial, procedural, socioeconomic, and cultural. The territorial dimension explains how planning decisions can create divided communities by controlling the location and power of minority communities, such as restricting the expansion of minority settlements (Yiftachel, 1998). The procedural dimension focuses on the implementation of policies. The planning process can be used to exclude various groups from decision-making; therefore, increasing the power
inequities that exist between groups. Examples include the rate of public participation, notification of planning meetings, information accessibility, and consultation in policy making (Forester, 1993; Yiftachel, 1998).

The socioeconomic dimension focuses on using planning to maintain “socioeconomic control and domination” by widening the economic gaps between neighboring jurisdictions (Yiftachel, 1998). Examples include high developmental cost of housing, and physical accessibility to the jurisdiction that benefits the interests of the dominant group (Yiftachel, 1998; McLoughlin, 1994). The cultural dimension focuses on the impact of planning on the cultures living in the community (Yiftachel, 1998). Specifically planning initiatives focuses on promoting the privileges of the “core culture” at the expense of minority populations (Yiftachel, 1998, p. 13). Cultural settlement patterns and the location of housing, religious, and cultural facilities promote the character, accessibility, and norms of urban areas (Yiftachel, 1998, p. 13; Penrose, 1995).

**Political boundary theory.** Political boundaries serve as a mechanism to provide information to residents regarding the geographic, political, economic, and social functions of each jurisdiction (Weiher, 1991, p. 33-34). This model differs from the public choice model, because boundaries exist to present information regarding the public goods of each jurisdiction, but also present geographic, economic and racial identity and demographics of each jurisdiction.

The first function of boundaries is geographic because they divide land creating different areas (Weiher, 1991). Second, boundaries determine who has the political authority to govern, tax, spend, and to decide what to do with the land within that geographic space. Third, boundaries serve an economic function especially in terms of
providing opportunities for employment, distribution and provision of goods and services (Weiher, 1991; Kasarda, 1985). Finally, boundaries define populations and to a degree, impose the relationships between populations within a geographic area. Multiple political boundaries are interactive mechanisms that link political fragmentation to racial segregation. Such boundaries act as a way to categorize residential preferences with each jurisdiction conveying distinct demographic, economic, racial, and cultural identities or narratives with geography (Bischoff, 2008).

School district boundaries, like municipal boundaries, also serve as a sorting mechanism where the quality of public schools often serve as a representative of the type of public goods available within a municipality. School quality are linked to better economic and social outcomes, and therefore access to communities with quality schools are often linked to higher community characteristics such as property values (See Bischoff, 2008; Figlio & Lucas, 2004; Brassington & Haurin, 1996).

The concept of political boundaries in some of the literature considers boundaries to be race neutral. Bischoff (2008) observed that the geographic function of political boundaries is not strictly due to the racial characteristics of the jurisdiction, but a dividing line that separates geographic areas. She further argues that currently, by law, people are not required to live in certain jurisdiction due to their race. Bischoff does point out that, “fragmentation activates or enables racial differences in preferences or resources” (p. 185).

**Boundaries are Race Based Mechanisms**

This dissertation contends that suburban political boundaries are not racially neutral, but racially based mechanisms. Past and current amalgamation of political
boundaries depicts a saga of the legal division of the metropolitan space exclusively by race, class, income, ethnicity, and religion (See Massey & Denton, 1998). Boundaries are not purely geographic entities, but also sociopolitical interactions with the physical space, where suburban municipalities were exclusively created for the enjoyment of Whites and where minority, specifically Black populations, were confined and relegated to the most unwanted, inhabitable metropolitan areas (Freund, 2006; Rothstein, 2014, 2017; Massey & Denton, 1998). Identifying boundaries as race neutral helps to minimize the role that past and current policies has played in determining where certain populations can live, what schools they can access, and what opportunities were in reach. Further, the characterization of these boundary theories continues to center on whiteness as the main unit of analysis to assess the type, quality, and sustainability of the suburban space, ignoring the benefits of a diverse space and community.

For this dissertation, the politics of exclusion and the political boundary theory all have elements that could help explain how and why these suburban metropolitan districts have transformed. First, the political boundary theory is used to describe the geographic, political, economic, social, and cultural functions and identities of each suburban jurisdiction over time. Second, the politics of exclusion theory is the only model that explains how municipalities use policy to maintain or transform the demographics. The politics of exclusion model, along with the ‘planning for control’ theory, discusses the choices of political actors, such as municipalities, to enact exclusionary policies. I argue that the model can also be used to effectuate inclusionary policies as well to recruit residents that fit within the sociopolitical and cultural identity of each jurisdiction.
(homogeneous and diverse); therefore, contributing to the segregation between these jurisdictional areas.

Conclusion

Spatial literature and case law continue to pit urban and suburban areas against each other allowing for the maintained perception that suburban communities are White areas only, thus discounting the recent demographic shifts diversifying the suburbs and ignoring the increasing segregation that exists between suburban areas even in affluent counties (See Chetty & Hendren, 2015).

A case study approach to assess the role of policy in the demographic shaping and segregation between northern metropolitan inner ring suburban school districts affords this dissertation the opportunity to contribute effectively to other suburban and urban residential and school segregation literature and jurisprudence. I seek to dismantle the perception that de facto segregation and de jure segregation are two separate entities, but that de facto segregation is indeed a product of intentional housing and school decisions. I challenge the notion that objectively quality suburbs are predominately White affluent areas. Additionally, I also explore the tools local municipalities and school districts use to construct distinctive and divisive jurisdictional boundaries from 1960 until present through a political boundaries and politics of exclusion framework.

Research Questions

Based on the literature, the research questions that guided this study are:

1. How does housing and school policy function together to impact the racial and economic segregation between two school districts within an affluent suburban county in the northeast?
a. How have school districts and municipalities’ housing and population demographics in Montgomery County changed between 1960-2014?

b. What federal, state, and local housing and school district policies and jurisprudence contribute to the demographic segregation between suburban school districts in Montgomery County, and how, respectively, do they do so?
Chapter Three

Methodology

Introduction

This research was conducted as a sequential mixed method multiple embedded case study (Yin, 2009). This case study compares the zoning, housing, and school policies with the demographics of two suburban school districts and the districts encompassing municipalities in Montgomery County, Pennsylvania between 1960-2014, to determine how policy impacted or impacts the racial and economic segregation between suburban school districts. This chapter discusses the time frame, site selection, research methodology, the new suburban metropolitan history methodological framework, research design, data collection, and analysis of the study. Furthermore, this chapter addresses my positionality in conducting the study.

Time Frame

The time frame utilized for the case study is between 1960 and 2014. 1960 was chosen as the starting point for two reasons: 1.) Northern inner ring suburban communities experienced the most population and housing development growth in the 1960s (US Census, 1960) and 2.) Federal and state civil rights legislation, jurisprudence, and policy in education and housing proliferated during this decade (See Civil Rights Act of 1964; Fair Housing Act, 1968). To provide historical context and outcomes to the policy and demographic changes between 1960 and 2014, this study also explored demographic and policy data from earlier and more recent time periods.
Selection of Sites for the Research

With regards to this research study, the definition of suburb is a municipality within a metropolitan area located immediately outside of the metropolitan’s central city (Frey, 2003, p. 155). According to the United States Census Bureau (2010) and the Office of Management Budget (OMB) (2013) the Philadelphia\textsuperscript{2} Metropolitan Statistical Area\textsuperscript{3} includes the following Pennsylvania counties\textsuperscript{4}: Bucks, Chester, Delaware, Montgomery, and Philadelphia (City of Philadelphia) (See Figure 3-1). Municipalities within these counties fit this definition of a suburb of Philadelphia.

**Figure 3-1**: Pennsylvania suburban counties of the Philadelphia Metropolitan Area

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{philadelphia_suburbs.png}
\caption{Southeastern Pennsylvania}
\end{figure}


---

\textsuperscript{2} The Philadelphia metropolitan area is currently the seventh largest in the country (Mathis, 2016). The Philadelphia-Camden-Wilmington (PA-NJ-DE-MD) Metropolitan Statistical Area (MSA) includes counties serving Camden, NJ (Burlington County, NJ; Camden County, NJ; Gloucester County, NJ) and Wilmington, DE (New Castle County, DE; Cecil County, MD; Salem County, NJ) (OMB, 2015, p. 44).

\textsuperscript{3} The Office of Management and Budget’s 2010 regulations defined MSA as having “at least one urbanized core area of 50,000, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties.” (p. 37252). If the MSA has a population of more than 2.5 million or more, it may subdivide to form smaller groupings (by city) referred to as Metropolitan Divisions (OMB, 2010, p. 37251-37252).

\textsuperscript{4} In 1682, William Penn created three counties, Philadelphia, Bucks, and Chester County. Montgomery County separated from Philadelphia in 1784 (Pennsylvania State Association of Township Supervisors, 2007; Cheltenham School District (CSD), 2005).
Montgomery County, Pennsylvania

Montgomery County, Pennsylvania was selected because it is distinctly different demographically and economically from Philadelphia. Table 3-1 shows that the city of Philadelphia is the most populated county (1,546,920) and has the largest minority population in Pennsylvania (58.4% Black, Asian, Hispanic, and other non-White populations) (ACS, 2010-2014). Montgomery County is a majority White county. Philadelphia is also one of the poorest, while Montgomery County is the second wealthiest and the third most populated county in Pennsylvania. Additionally, Montgomery County boasts several nationally ranked schools (USA.com; Montgomery County; U.S. Census 2010).

Table 3-1: Population and income comparisons of the Pennsylvania, Philadelphia County, and Montgomery County (2014)

<table>
<thead>
<tr>
<th></th>
<th>United States</th>
<th>Pennsylvania</th>
<th>Philadelphia County</th>
<th>Montgomery County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>314,107,084</td>
<td>12,787,209</td>
<td>1,546,920</td>
<td>816,857</td>
</tr>
<tr>
<td>Race</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>73.8%</td>
<td>82.9%</td>
<td>41.6%</td>
<td>81.4%</td>
</tr>
<tr>
<td>Black</td>
<td>12.6%</td>
<td>11.6%</td>
<td>43%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Asian</td>
<td>5%</td>
<td>3.3%</td>
<td>7.2%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>Hispanic</td>
<td>16.9%</td>
<td>6.6%</td>
<td>13%</td>
</tr>
<tr>
<td>Non-White</td>
<td>26.2%</td>
<td>17.1%</td>
<td>58.4%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MHI</td>
<td>$51,914</td>
<td>$53,115</td>
<td>$37,460</td>
<td>$79,926</td>
</tr>
<tr>
<td>% Below Poverty</td>
<td>13.8%</td>
<td>13.6%</td>
<td>26.7%</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

Source: ACS, 2014

Despite Montgomery County’s affluence and overall racial homogeneity in comparison to Philadelphia, its 62 suburban municipalities and 23 school districts offer opportunities to observe economic and population inequities between suburban school districts and municipalities (See Figure 3-2), each of which tells a very distinct story regarding issues.

5 The Hispanic category for the US Census is defined by the OMB as a person of Cuban, Mexican, Puerto Rican, South or Central American, or any additional Spanish culture of origin in spite of race (US Census, n.d.-a).
of diversity and inclusion. Chetty & Hendren (2015) have quantitatively measured the benefits of poor students moving to affluent suburban counties throughout the United States, but fail to acknowledge the socio-economic and racial inequalities existing between the municipalities and school districts of these affluent counties. This research focused on the demographic transformation and segregation between two school districts in Montgomery County, Cheltenham and Lower Merion School District.

**Figure 3-2:** Montgomery County school districts and municipalities

![Map of Montgomery County](source: Keller Williams Real Estate, 2011)

**Cheltenham and Lower Merion School District.** Using purposeful sampling, Lower Merion and Cheltenham School Districts are ideal partners to compare the trajectory of how policies influence the demographic segregation between spaces for three reasons (See Table 3-2). First, they are both inner ring suburban districts. Second, Cheltenham School District’s boundary is coterminous with the municipality while
Lower Merion School District serves two municipalities (See Figure 3-2). Finally, fifty years ago these two entities had very similar demographics but diverged significantly over time.

**Table 3-2:** School district study variations

<table>
<thead>
<tr>
<th>School District</th>
<th>1. Inner Ring Suburbs</th>
<th>2. Type of Municipality</th>
<th>3. Divergent Demographics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheltenham School District</td>
<td>Adjacent to Northwest Philadelphia</td>
<td>Single-Municipality Cheltenham Township (Large)</td>
<td>Diverse Race and SES</td>
</tr>
<tr>
<td>Lower Merion School District</td>
<td>Adjacent to West Philadelphia</td>
<td>Multi-Municipality: Lower Merion Township (Large) and Narberth Borough (Small)</td>
<td>Majority White, Affluent</td>
</tr>
</tbody>
</table>

**Inner ring suburbs.** Regarding physical geography, Cheltenham School District is located adjacent to northwest Philadelphia, while Lower Merion School District is adjacent to west Philadelphia. Inner ring suburban communities are tied culturally, economically, and even demographically to the urban center (Lucy & Phillips, 2003). Hanlon (2010) characterizes inner ring suburbs as wealthy, elite, ethnic, middle class, and in crisis. Other studies indicate that a majority of inner ring older suburbs have experienced rapid racial and economic changes that reflect their adjacent central city demographics (Frankenberg, 2012; Orfield, 1997). Myron Orfield (1997) argues that families move “up and out” and leave behind “an increasingly dense core of poverty in the city and rapidly growing social needs in the older suburbs” (p. 1). Demographically, these suburbs tend to be increasingly racially and economically diverse, but represent patterns of racial and economic segregation (Frankenberg and Orfield, 2012). As older inner ring suburban communities, Lower Merion and Cheltenham are both connected to
Philadelphia but in far different and divergent ways that have contributed to the demographic and cultural segregation between urban and suburban areas as well as between suburban areas.

**Type of municipality.** This study also sought to examine the single municipality versus multiple municipality school districts binary. Studies indicate that jurisdictions with very large and small populations are most likely to share services, such as education, while medium sized communities are most likely to retain local control of its school district (Brasington, 1999; Ferris & Graddy, 1988). Frankenberg & Kotok (2013) argue that unlike multi-municipal districts, single suburban municipal school districts tend to have fewer school district policy options dealing with school diversity because the housing market and policy tends to control the demographics of those school districts.

Lower Merion School District serves both Lower Merion Township and Narberth Borough. Lower Merion Township is the largest municipality in the County with a 2014 population of 58,273, and Narberth is one of the smallest with a population of 4,295 (ACS, 2010-2014). Cheltenham School District serves only Cheltenham Township. Cheltenham Township is the third largest district in the County with a population of 36,912 (ACS, 2010-2014).

**Divergent demographics.** Finally, this study sought to explore municipalities and school districts that had similar racial and economic demographics in 1960 but diverged significantly over time to identify how policy may have contributed to increasing the racial and economic segregation between suburban districts.
**Racial demographics.** In 1960, Lower Merion Township, Narberth Borough, and Cheltenham Township had a White population ranging from 95% to 99%. Figures 3-3, 3-4, and 3-5 show that within 54 years, Cheltenham Township’s White population decreased to approximately 55%, while Lower Merion Township and Narberth Borough’s decreased slightly to 84% and 93% respectively (ACS, 2010-2014).

**Figure 3-3.** Cheltenham Township racial demographics from 1960-2010

![Cheltenham Township racial demographics from 1960-2010](image)


**Figure 3-4: **Lower Merion Township racial demographics from 1960-2010

![Lower Merion Township racial demographics from 1960-2010](image)

**Figure 3-5:** Narberth Township racial demographics from 1960-2010

The effects of demographic shifts in these municipalities are even more significant when analyzing school district demographics. The 2013-2014 White school enrollment percentages in Lower Merion School District was approximately 77%, while Cheltenham School District was 36.8% (Figure 3-6, 3-7). The racial demographics indicate that both areas have become increasingly racially diverse, but at different scales. Lower Merion School District has stayed overwhelmingly White, whereas Cheltenham has changed dramatically forming an increasing majority Black, minority student population.
Figure 3-6: Cheltenham School District racial demographics 1990-2014


Figure 3-7: Lower Merion School District racial demographics 1990-2014


**Income demographics.** According to Table 3-3, in 1980, Lower Merion Township and Cheltenham Township’s median household income (MHI) and percentage of the population under the poverty threshold were comparable and superseded the MHI of Montgomery County (US Census, 1980). Only a $5,000 difference existed between Lower Merion Township’s MHI of $30,006 and Cheltenham Township’s MHI of $25,048 (US Census, 1980). All three municipalities poverty percentage ranged from 4.7% to 5.1% (US Census, 1980). However, the income gap between these spaces began
to widen drastically in the 1990s. By 2014, the MHI gap between Lower Merion and Cheltenham Township’s MHI stood at $35,731 (ACS, 2010-2014). In 2014, Cheltenham Township’s MHI was at $75,831, below Montgomery County’s $79,926 (ACS, 2010-2014). Narberth Borough’s MHI was at $88,090, and Lower Merion Township had a MHI of $115,657 (ACS, 2010-2014). The poverty rate percentage also changed. Even though all three jurisdictions are under 10%, Lower Merion and Narberth stayed rather stagnant while Cheltenham’s poverty percentage rate has grown to 8.4% (See Table 3-3).

Table 3-3: Lower Merion Township, Narberth Borough, Cheltenham Township, and Montgomery County median household income and poverty rate 1980-2014

<table>
<thead>
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</thead>
<tbody>
<tr>
<td><strong>Median Household Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LMT</td>
<td>$30,006</td>
<td>$63,197</td>
<td>$86,373</td>
<td>$78,040</td>
<td>$115,657</td>
</tr>
<tr>
<td>Narberth</td>
<td>$19,773</td>
<td>$41,823</td>
<td>$60,408</td>
<td>$111,165</td>
<td>$88,090</td>
</tr>
<tr>
<td>Cheltenham</td>
<td>$25,048</td>
<td>$47,049</td>
<td>$61,713</td>
<td>$71,516</td>
<td>$75,831</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>$22,508</td>
<td>$43,720</td>
<td>$60,829</td>
<td>$76,380</td>
<td>$79,926</td>
</tr>
<tr>
<td><strong>Poverty Rate</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LMT</td>
<td>4.8%</td>
<td>3.9%</td>
<td>4.5%</td>
<td>5.4%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Narberth</td>
<td>4.9%</td>
<td>4.9%</td>
<td>3.4%</td>
<td>1.8%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Cheltenham</td>
<td>5.1%</td>
<td>3.7%</td>
<td>5.1%</td>
<td>8.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>4.7%</td>
<td>3.6%</td>
<td>4.4%</td>
<td>5.6%</td>
<td>6.4%</td>
</tr>
</tbody>
</table>


Like the school district racial demographics, the socio-economic student district indicators such as the Free and Reduced Price Lunch (FRPL) percentages show a more pronounced picture regarding the socio-economic segregation between these suburban districts. The percentage of students receiving FRPL is used as a proxy to measure students living in poverty (Snyder & Musu-Gillette, 2015). According to Figure 3-8, in the 1999-2000 school year, both school districts’ FRPL percentages were at around 4.5% each. Within 14 years, Lower Merion School District’s FRPL has increased slightly to

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6 Prior to 1980, the US Census primarily used Median Family Income and not Median Household Income as a unit of analysis to determine income (US Census 1960, 1970).
8.26% during the 2013-2014 school year whereas Cheltenham School District’s FRPL has increased to 23.7% (Figure 3-8).

**Figure 3-8:** Lower Merion School District and Cheltenham School District free and reduced price lunch percentage from 1999-2000, 2009-2010, and 2013-2014

Over the course of 54 years, the archival data shows that Lower Merion School District and its municipalities of Lower Merion Township and Narberth Borough have only grown in affluence and maintained its White municipality and student population (US Census 1960-2010; ACS, 2010-2014; NCES, 1989-1990; 2013-2014). Cheltenham School District and Cheltenham Township on the other hand has diversified significantly in both race and income (US Census 1960-2010; ACS, 2010-2014; NCES, 1989-1990; 2013-2014). This study serves to answer why and how these spaces transformed so significantly through the examination of federal, state, and local housing and education policy.

One caveat is that for the sake of time, I set aside Narberth Borough’s individual housing and education story. Due to Narberth’s small area and population, I decided to use Lower Merion Township as the proxy to explain the narrative of this region.
New Suburban Metropolitan History: Methodological Framework

I utilized the new suburban metropolitan history to serve as the methodological framework to undergird this dissertation. Multiple case studies exist regarding the political fragmentation of northern metropolitan areas. However, these studies, like the Courts, tend to bifurcate the impact of residential and school policy as separate contributors to segregation in the suburbs. There is an inclination for urban/suburban scholars to stress public and private housing policies as the sole contributor to the creation of segregated areas in suburban metropolitan areas; thus, choosing to ignore or separate educational policies from the conversation (Lassiter, 2012; Dougherty, 2012).

Scholars need to pursue a new methodological approach that focuses on the interconnectedness between education and housing policy to effectively address segregation in metropolitan areas (Lassiter, 2012; Dougherty, 2012). Specifically, Jack Dougherty (2012) calls this period, “new suburban history” or “metropolitan history” which demands for a better understanding of the roles of schools, not just housing, in the regional fragmentation and diversity of the suburbs. Touching on this methodological approach some social science and education researchers such as, Gary Orfield, Myron Orfield, Shapiro, Richards, Erickson, Dougherty, Benjamin, and Frankenberg have written on the interdependent nature of school policy and housing policy to assess the effectiveness of civil rights remedies to school segregation and to address practices that

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continues to limit the educational opportunities for minority and low income populations in segregated suburban communities.

A recent example of this methodological approach focused on the historical, political, and demographic trajectory of three suburban school districts in Hartford, Connecticut to determine how suburban municipal and school districts attract or steer away certain city residents (Dougherty, 2012). These suburban municipal and school district policy and actions contributed to extreme segregation between the three school districts (Dougherty, 2012). Additional scholarship analyzed the way school leaders aid in the social economic and racial transformation in the suburbs (See Frankenberg and Orfield, 2012).

This dissertation utilizes this methodological framework to investigate the ways that schools and municipalities apply policy to contribute to racial and income demographic transformations and segregation between suburban communities.

**Research Design**

**Sequential Mixed Methods**

To effectively conduct this multiple embedded case study, a sequential mixed method design was performed, starting with demographic, quantitative descriptive statistics to measure and analyze the changing municipality and school enrollment demographics of the two school districts and their encompassing municipalities between 1960-2014. Next, qualitative methods were utilized to analyze key zoning, housing, and school federal, state, and local policies and jurisprudence that may have contributed to the demographic and economic segregation between Lower Merion School District and Cheltenham School District (Krathwohl, 2009). A sequential mixed methodology design
was necessary to obtain a broad, comprehensive view of how policy impacts the education and housing opportunities of low-income and minority populations within suburban communities and school districts, as recognized through the demographic and geographic shaping of these suburban communities in Montgomery County, Pennsylvania (Yin, 2014).

The school districts and the municipalities represent individual units of analysis. I analyzed demographic and policy data from each unit of analysis. Table 3-4 provides a description of this multiple case study design. Case #1 focuses on the Lower Merion School District. The units of analysis #1A regard the policies and demographic data of Lower Merion Township and Narberth Borough, whereas unit of analysis #1B regards the policies and demographic data of Lower Merion School District. Case #2 focuses on the Cheltenham School District. The unit of analysis #2A regards the policies and demographic data of the Cheltenham Township, while unit of analysis #2B regards the policies and demographic data of Cheltenham School District.
Table 3-4: Mixed method multiple case study embedded design

<table>
<thead>
<tr>
<th>Context: Montgomery County, Pennsylvania (Inner Ring Suburb)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case #1: Lower Merion School District (Affluent/ White SD) → Stayed the Same w/in 54 years (1960-2014)</td>
</tr>
<tr>
<td>Unit of Analysis #1A: Municipalities</td>
</tr>
<tr>
<td>Lower Merion Township</td>
</tr>
<tr>
<td>Demographic Data Policy Data (Housing, Zoning)</td>
</tr>
<tr>
<td>Case #2: Cheltenham School District (Mixed/ Heterogeneous SD) → Changed Dramatically w/in 54 years (1960-2014)</td>
</tr>
<tr>
<td>Unit of Analysis #2A: Municipalities</td>
</tr>
<tr>
<td>Cheltenham Township</td>
</tr>
<tr>
<td>Demographic Data Policy Data (Housing, Zoning)</td>
</tr>
</tbody>
</table>

**Justification of Source Data Analyzed**

To perform this case study, multiple types of data were utilized. To answer the sub-question how have school districts and municipalities’ housing and population demographics in Montgomery County changed between 1960-2014, this study used archival records such as maps, charts, tables, and statistical data (Yin, 2014). To answer the second sub question what federal, state, and local housing and school district policies and jurisprudence contribute to the demographic segregation between suburban school districts in Montgomery County, and how, respectively, do they do so, this study utilized qualitative data (See Yin, 2014) such as documentation (Barzun & Graff, 1985), interviews (Rubin & Rubin, 2011), and direct observations (Yin, 2014).
Quantitative Data

Municipality Data

Municipality data was derived from the US Census Bureau (1960-2010) and the American Community Survey (ACS) five-year estimates (2010-2014). The US Census Bureau collects and describes population data on the basis of race and class in the United States on a decennial basis (US Census, n.d.-c). The American Community Survey is a nationwide survey collecting housing and population information every year instead of every ten years, providing up to date data regarding changes at the community level (US Census, n.d.-d). Approximately 3.5 million housing unit addresses are selected annually across the country to take the American Community Survey (US Census, n.d.-d). Both the US Census and the ACS data focused on providing demographic data for the following jurisdictions Pennsylvania, Montgomery County, Philadelphia County, Cheltenham Township, Lower Merion Township, and Narberth Borough. To describe the distribution of race, class, and housing patterns of each municipality, the tract-level data was also explored. Lower Merion Township, Narberth Borough, and Cheltenham Township’s tracts are representative of the historical and geographical neighborhoods make up each of these municipalities.

Ten variable topics were chosen to measure the demographic changes and patterns of each jurisdiction from the 1960, 1970, 1980, 1990, 2000, 2010 US Censuses and 2010-1014 ACS five-year estimates.

- **Population.** The variables Population and Population Percent Change measures the size of each space, and helps to determine whether a jurisdiction has increased or decreased in population over time.
- **Age.** The variables Median Age, Persons Under 18 years (US Census 1990), and Persons 65 years and over are important to measure the age of the community, school age population, as well as determine the needs of the community due to the shift in ages.

- **Race.** The variables White alone, Black alone, Asian, Hispanic, American Indian and Alaska Native, and Two or More Races were utilized to measure the race of each jurisdiction. These variables determine the racial changes of each jurisdiction over time (Massey & Denton, 1998). For this study, the Non-White or Minority measurement represents Black, Hispanic, Asian, American Indian and Alaska Native, and Two or More Races populations.

- **Income.** To determine socioeconomic differences between municipalities, this study used the Median Household Income (MHI) and Percentage of the Population Under the Poverty threshold variables. Median household income measures the income of the householder and all other individuals 15 years and older in the household, related or unrelated (US Census, n.d.-e). The US Census Bureau considers the median household income data its main demographic unit of analysis, instead of per capita income and median family income (Jones & Weinberg, 2000). Individuals or families\(^8\) are considered in poverty if their pre-taxable income falls below a set dollar amount or a threshold identified by the

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\(^8\) According to the OMB, the 2014 poverty thresholds for one person (unrelated individual) is $12,071; two people $15,379; three people $18,850; four people $24,230; five people $28,695; six people $32,473; seven people $36,927; eight people $40,968; and nine or more $49,021 (Office of the Assistant Secretary for Planning and Evaluation, 2014).
Office of Management and Budget (OMB)\(^9\) (Institute for Research on Poverty, 2016). These income variables help determine the affluence of a jurisdiction.

- **Housing occupancy.** The variables Total Housing Units, Occupied Housing Units, and Vacant Housing Units determines whether a jurisdiction has constructed new housing units, consolidated or demolished housing units, and determines if housing units remain occupied or vacant overt time (US Census, n.d.-f).

- **Housing tenure.** Homeowner Occupied Units and Renter Occupied Units identify a basic feature of the housing inventory by determining the opportunities for housing through buying or renting (Mazur & Wilson, 2011).

- **Housing inventory.** The variables 1 Unit Detached, 1 Unit Attached, 2-4 Units, 5-9 Units, 10-19 Units, 20 or More Units, and Mobile Home assess the type of housing available in each jurisdiction. The housing inventory explains whether a jurisdiction provides housing for different types of populations (Shuster, 2011). For example, a jurisdiction can bar entry of low-income and minority populations by restricting or limiting the development of multifamily housing (See Bischoff, 2008).

- **Median housing cost.** The Median Value of Housing and Median Gross Rent assess the cost to access housing in these jurisdictions (Shapiro, 2005).

- **Education attainment.** The Education Attainment variables measure the percent of the population 25 years or older highest education level. The variables that were used are Less than 9\(^{th}\) Grade, Less than High School (9\(^{th}\)-12\(^{th}\)), High School

\(^9\) The poverty threshold does not vary geographically but is updated each year for inflation using the Consumer Price Index (US Census, n.d.-b).
Graduate, Some College (no degree), Associate, Bachelors, and Graduate, as well as Percent High School Graduate or Higher and Percent Bachelor’s Degree or Higher. Education attainment can be also indicative to the affluence of a jurisdiction (See Frankenberg, 2009).

- **Education enrollment.** The Education Enrollment variables measure the public and private student population from pre-school to college. The variable Kindergarten to 12th Grade (Public and Private) determines the type of school students are using in each municipality (US Census).

### School District Data

I primarily used the National Center for Educational Statistics’ Common Core of Data (NCES) Public School Universe\textsuperscript{10} from 1990 until 2014 to retrieve Cheltenham School District and Lower Merion School District data. NCES data collects school enrollment figures from almost every district and school in the country (Frankenberg, Lee & Orfield, 2003). This analysis used the NCES data to determine school enrollment, race, and free and reduced price lunch for school district and school data during the school years 1989-1990, 1999-2000, 2009-2010, and 2013-2014. This study primarily focused on elementary school demographics because they are associated with the smallest attendance zones since their enrollment patterns most closely reflect housing and neighborhood patterns (Orfield, M. & Luce, 2010).

- **School enrollment.** The School District and School Enrollment variable measures the enrollment size of each district and along with the educational

\textsuperscript{10} The earliest available NCES Common Core of Data school district and school level data is 1987 (NCES, n.d.-a, b).
enrollment variables from the US Census determines whether the district has increased or decreased over time.

- **Race.** The variables White only, Black only, Asian, and Hispanic were utilized to measure the race of each school and school district. These variables determine the racial changes over time (Richards, 2014).

- **Free and Reduced Price Lunch (FRPL).** FRPL is recognized as a proxy to measure the percentage of students living in poverty but it should not be confused with the percentage of students in poverty (Snyder & Musu-Gillette, 2015). Students from households with an income 130% of the poverty threshold are entitled to free lunch. Students from households with an income between 130% and 185% of the poverty threshold are entitled to reduced price lunch (Snyder & Musu-Gillette, 2015). The 1998-1999 school year is the most recent year available for Free and Reduced Price Lunch level NCES data.

**Quantitative Analysis**

Through this temporal scheme, I could compare, as well as determine the changes in demographics of each jurisdiction.

As a reference, I used Montgomery County and Philadelphia County demographics as markers to determine the relative affluence and racial diversity of the Lower Merion and Cheltenham School District as well as their encompassing municipalities (Lower Merion Township, Narberth Borough, and Cheltenham Township). Research shows that older, inner ring suburban communities such as Lower Merion, Narberth and Cheltenham are demographically tied to the urban center (Lucy & Phillips, 2003), and that these communities are more likely to have experienced rapid racial and economic changes reflective of the central city demographics (Frankenberg, 2012; Orfield, 1997). It was important to use Montgomery and Philadelphia County’s demographics to determine in what ways these municipalities and school districts differ or mirror the suburban and urban county. For example, if the renter percentage in one site was more akin to Philadelphia over time and not to Montgomery County, I could assess possible access points for incoming populations from Philadelphia. Conversely, if the renter percentage of one site was less than or akin to Montgomery County’s then I could assess that possible access points for incoming populations from Philadelphia are limited.

I used this process to create a demographic profile for each case, and could ascertain when demographics began to shift as well as what characteristics, specifically in housing, could begin to explain the income, education, and racial shifts of each jurisdiction and vice versa. To depict the data, I used a variety of tools, other Excel documents, tables, figures, and maps. Moreover, this study used Social Explorer, a
research database to construct municipality and tract level maps based upon the US Census and ACS data from 1960-2014 to present a visual representation of each municipality’s racial and median household income spatial demographic changes. This program allowed me to visually understand the relationship between jurisdictions and the relationships between neighborhoods within a jurisdiction. Quantitative data analysis explained what happened over time, but only the qualitative data could explain why and how these spaces diverged demographically.

**Qualitative Data**

Municipality and school district qualitative data was derived from a variety of different sources at the federal, state, and local level to explore the zoning, housing, and school policies that contributed to the racial and economic segregation between Cheltenham and Lower Merion School District. The multiple sources and types of data helped to triangulate the data (Maxwell, 2005).

**Documents**

The documentation sources collected and analyzed in this study included school board minutes (1980-2000), newspaper articles (1960-2016), comprehensive plans (1937-2016), Analysis of Impediments to Fair Housing (AI) (2012, 2015), Consolidated Annual Performance and Evaluation Report (CAPER) (2010-2015), federal, state, and local case law and ordinances (1926-2016), school district documents (1979-2016), and municipality housing documents (1970-1979). Use of different types of documentation covers a broad array of policies within a lengthy time span to answer what, why, and how policies within these jurisdictions created the demographic conditions and cultural identities of these suburban school districts and municipalities. Furthermore, the
multitude of documentation helped to minimize the gaps in the data and to solve issues of bias in the selectivity of the sources (Yin, 2014).

**School board minutes.** School board minutes were collected from Cheltenham School District and Lower Merion School District from 1980-2000. The school board minutes provided snapshots of the conditions, policies, concerns of the school district and residents of the time. The 1980-2000 timeframe was chosen because Cheltenham Township began to transform demographically around 1980 and by the end of the 1990’s these jurisdictions became intrinsically identified by their demographics. The minutes could provide answers to the role school districts played in preventing and motivating these changes. However, Cheltenham and Lower Merion School Board minutes produced different content.

Cheltenham School District minutes were very detailed and provided substantial information regarding the school board members, policies, initiatives, conditions, awards, transportation, budget, relationships with students, residents, and other school districts. The school board minutes were rich with the opinions and discussions between students, parents, residents, school district personnel, and school board members.

Lower Merion School District minutes were not as detailed. The minutes operated as an agenda and not an account of the meeting’s discussions. The school board minutes alone did not elicit much information, but the minutes included attachments that described policies, budgets, long-term plans, student enrollment counts, and superintendent reports that helped to paint a picture of what the school district cared about and looked like during this time period. However, the minutes did not include any

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11 Due to the Right to Know Request copy cost, it became economically prudent to narrow the scope to a timeframe that would elicit the most information.
opinions and discussion of these policies nor did it discuss the issues and concerns of the school district.

**Comprehensive plans.** The Pennsylvania Municipalities Planning Code (1968) defines comprehensive plans as “a land use and growth management plan prepared by the county [or local municipality] planning commission and adopted by the county [or municipality] commissioners” (p. 2). Lower Merion Township, Narberth Borough, and Cheltenham Township each have comprehensive plans that establish land use goals for the community to manage and develop its environmental, institutional, housing, transportation, regional partnerships, and community relationships. However, for this dissertation, I limited the scope of my analysis to Montgomery County, Lower Merion Township, and Cheltenham Township’s comprehensive plans. Narberth Borough was dismissed due to its small population and area. Due to the size and influence of Lower Merion Township and Cheltenham Township, these jurisdictions would provide a deeper understanding of how municipalities create and implement housing and zoning policies that build up or break down suburban and urban boundaries. There are multiple comprehensive plans for each jurisdiction that span the time frame from 1937 to 2016.

This study examined the most recent Montgomery County Comprehensive Plan, titled MONTCO 2040: A Shared Vision (2015). This county comprehensive plan provides a framework for local municipality comprehensive plans on issues that transcend local boundaries (MC, 2015). The county plan provided a context to understand the current outlook, demographics, issues and culture of the County and its municipalities.
Furthermore, this study analyzed all five of Lower Merion Township Comprehensive Plans: A Plan for Lower Merion Township (1937), For the Growth of Lower Merion Township (1954), General Comprehensive Plan (1962), 1979 Comprehensive Plan (1979), and A Comprehensive Plan for the Preservation, Infill, and Redevelopment of Lower Merion Township, Montgomery County, Pennsylvania (2016). All the plans were accessible online.

Additionally, I analyzed three comprehensive plans for Cheltenham Township, the 1969, 1977, and 2005 comprehensive plans. The only existing 1969 comprehensive plan is a summary produced on a poster. There are comprehensive plans prior to 1969, but they were unavailable for review.

**Analysis of impediments to fair housing.** The Housing of Development Act of 1974 and the National Affordable Housing Act of 1990 require that all jurisdictions entitled to receive an annual allocation of state-administered Community Development Block Grant (CDBG) funds must certify that they are making steps to further fair housing (HUD, 1996). Each jurisdiction must conduct an annual analysis of impediments to fair housing (AI), which is a review of each community’s housing needs among low-and moderate-income households, minority groups, and other protected classes (elderly and persons with disabilities) (HUD, 1996). This study analyzed only the recent AIs from Montgomery County and Lower Merion Township. AIs are conducted every five years. Montgomery County serves as an entitlement jurisdiction to distribute CDBG funds to all Montgomery County municipalities except for Abington Township, Limerick Township, Norristown Borough, and Lower Merion Township (Montgomery County (MC), 2015c).
Therefore, Cheltenham Township and Narberth Borough is discussed but not a focused priority in the AI.

Lower Merion Township is an entitlement jurisdiction and the Community Development Division in Lower Merion Township is in charge of producing HUD documents and distributing CDBG funds for the needs of the Township. The Township indicated that earlier AIs were not available because they were disposed of due to lack of storage. HUD only requires jurisdictions to keep documents for a four-year period (Office of Community Planning and Development: Community Development Block Grant Program (HUD), 2005; LMT policy official, 2016).

**Consolidated annual performance and evaluation report.** The Consolidated Annual Performance and Evaluation Report (CAPER) is an assessment of state and local jurisdictions affordable housing, community development needs, and market conditions (HUD). Specifically, it addresses jurisdictions’ allocation and plan for Community Planning and Development Plan (CPD) programs such as Community Development Block Grant (CDBG) Program, HOME Investment Partnerships Program, Emergency Block Grant (ESG) Program, and Housing Opportunities for Persons with AIDS (HOPWA) Program (Lower Merion Township and Township of Lower Merion Community Development (LMT), 2012). This study focused on Montgomery County and Lower Merion Township CAPER documents from 2010-2015. Unlike AIs, the CAPERs are produced annually and provide information regarding what HUD funds are used for.

**Case law, laws, and ordinances.** Federal, Pennsylvania, Montgomery County, Cheltenham Township, Lower Merion Township, Cheltenham School District, and
Lower Merion School District case law were analyzed from 1896 to 2015. The beginning date of 1896 marks the US Supreme Court decision, *Plessey v. Ferguson*, which created the separate but equal doctrine in public accommodations, including schools. This decision led to the federal validation of explicit state segregation policies and laws. The end date, 2015, marks the US Supreme Court decision *Texas Department of Housing and Community Affairs (TDHCA) v. The Inclusive Communities Project, Inc.* (*ICP*), which validated use of a disparate impact claim under the Fair Housing Act of 1968. The case law, law, and ordinances are vast and serve the following topics: residential and school segregation, zoning powers and ordinances, affordable housing policies, as well as school powers and policies (See Appendix A for a case list and description).

**School district documents.** Other school district documents include long-range plans, strategic plans, enrollment studies, policies, and budget information from as early as 1979 to 2016. Most of the documents were from Lower Merion School District to supplement the lack of information retrieved from the school board minutes.

**Municipality housing documents.** Other municipality housing documents include individual housing studies published in the 1970s regarding access to affordable housing in Lower Merion Township. These housing documents help to provide context to the issues of providing affordable housing in Lower Merion Township. They were retrieved from the Lower Merion Township. I was not able to access additional housing documents from Cheltenham Township.

**Newspaper articles.** This study explored approximately 190 newspaper articles from 1950 to 2017 regarding Cheltenham Township, Cheltenham School District, Lower


**Other primary and secondary sources.** Historical documents and books on Lower Merion Township and Cheltenham Township from the Lower Merion Historical
Society, the Old York Road Historical Society, and libraries helped to provide context. This study also investigated other online articles.

**Interviews**

Thirteen semi-structured to unstructured interviews with school district personnel, school board members, county and municipality planners, municipality employees, residents, historians, and community organizers were conducted to offer further insight, explanation, and meaning behind the policies that contributed to the demographic segregation between these suburban school districts (Weiss, 1994). I recruited these interviewees through a variety of ways including e-mail, networks that brought me in contact with the interviewees, and through creating physical appointments in the county, municipality and school district offices.

The model interview protocol went through IRB approval and is divided into two sections, housing and education, to reach the interviewees (See Appendix B & C). Each interview took between 30 minutes to 2 hours. Some interviews were recorded but other interviewees did not want to be recorded. Regardless, I took extensive notes during the interviews and wrote memos after every interview. The interviewees served as informants, rather than participants (Yin, 2014). I did not give my interviewees a transcript of the interviews, since most of the interviews were not recorded. These informants elucidated critical insight to the reason behind the policies of each jurisdictional space and to triangulate the data already procured. To protect the identity of these informants I only identified the interviewee by what jurisdiction they work or live in, and whether they serve or served in a housing or education capacity (See Table 3-5). I also identified the interviewee by race. My interviewees tended to skew
predominately White. This condition existed because most of the leadership in place in the County, school districts, and municipalities tended to be White. However, I did not directly seek out Black or non-White officials and residents in the interview process. Instead I used a snowball sampling approach, allowing other interviewees to guide the next person I interviewed (Wasserman, Pattison & Steinley, 2005).

**Table 3-5**: Case study interviewees

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<thead>
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<th>Type</th>
<th>Jurisdiction</th>
<th>Citation12</th>
<th>Race</th>
</tr>
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<td>Cheltenham Township</td>
<td>Local official</td>
<td>White</td>
</tr>
<tr>
<td>Housing</td>
<td>Cheltenham Township</td>
<td>Local official</td>
<td>Black</td>
</tr>
<tr>
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<td>Resident</td>
<td>White</td>
</tr>
<tr>
<td>Housing</td>
<td>Cheltenham Township</td>
<td>Resident</td>
<td>Black</td>
</tr>
<tr>
<td>School</td>
<td>Cheltenham School District</td>
<td>School official</td>
<td>White</td>
</tr>
<tr>
<td>School</td>
<td>Cheltenham School District, Montgomery County</td>
<td>School official</td>
<td>White</td>
</tr>
<tr>
<td>Housing</td>
<td>Lower Merion Township</td>
<td>Local official</td>
<td>White</td>
</tr>
<tr>
<td>Housing/School</td>
<td>Lower Merion Township</td>
<td>Resident</td>
<td>White</td>
</tr>
<tr>
<td>School</td>
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<td>Housing</td>
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<tr>
<td>Housing/School</td>
<td>Philadelphia Metropolitan Area</td>
<td>Organizer</td>
<td>White</td>
</tr>
</tbody>
</table>

12 The citation column reflects how I cited each interviewee in the study.
Direct Observation

To understand the spatial, physical, and cultural environment of my sites, I conducted 30 site visits to Lower Merion Township and Narberth Borough. I have been to Cheltenham Township more than 30 times since my family still live in Cheltenham. I spent time driving throughout the municipalities, noting the neighborhoods, peoples, commercial spaces, housing, schools, sidewalks, and streets. I also took photographs specifically of the major thoroughfares that divide these suburban municipalities with the Philadelphia urban space (See Dabbs, 1982).

Qualitative Analysis: Making Sense of the Quantitative Data

I used a mixture of theoretical propositions and an inductive approach to observe and analyze my data. I had initial propositions\textsuperscript{13} prior to conducting this study. However, I did not focus on these theories when examining the data to allay any preconceived bias as a former resident of Cheltenham Township and graduate of Cheltenham School District. It was important to pour through the data as collected to find new and interesting patterns.

Since I had initial propositions, I did not utilize grounded theory to observe the data but I did use grounded theory’s inductive strategies to approach data analysis. The

\textsuperscript{13} Based on the literature I identified three suppositions regarding school and residential segregation in these school districts in Montgomery County. First, diverse municipalities provide more options for multifamily, affordable housing or other forms of housing than homogeneous, affluent communities (See Clapp, Nanda & Ross, 2008; Dougherty, 2009). Second, diverse municipalities and housing and zoning policies are least likely to practice implicit or explicit racist policies than homogeneous affluent municipalities (Weiher, 1991). Third, diverse suburban school districts are most likely to have policies and programs that promote diversity and equity than homogeneous, affluent school districts (See Dougherty, 2012).
procedures focused on assigning various codes or topics to the data, each code represented a concept or theme (Corbin & Strauss, 2008; Glaser & Strauss, 1967). Yin (2014) argues that the inductive approach could be utilized in case studies using theoretical propositions.

Since I conducted a cross case analysis, to effectively scrutinize the multiple sources of qualitative data I divided the data by case and embedded unit of analysis: Cheltenham School District (school district) and Cheltenham Township (municipality) on one end and Lower Merion School District (school district), Lower Merion Township (municipality) and Narberth Borough (municipality) on the other. I then examined each source by typology (documents, interviews, direct observations) using categorizing strategies such as open thematic coding (Gibbs, 2007). Serving as an organizational tool, Microsoft Excel software spreadsheets were utilized to conduct a matrix of codes from to place the evidence or data.

First, I extensively briefed or memoed each of the documents, interview and site visit, and used a Microsoft Word document to organize the document by title, author or participants, date, and proceeded to use the document headers to create the codes to summarize the data. For example, for case law, policies, and ordinances, I used legal methodology to code for the purpose of each case or law, the facts, the procedural history, issue, holding (applied rule of law), and reasoning for the holding (Makdisi & Makdisi, 2009). For school board minutes the codes were the topics or headings addressed in each of the minutes, such as the President’s Report, Superintendents Report, Treasurer Report, Policies/Grant, Facilities, Academic Progress, Public Comments, and School District and Township Relationship. For housing and other school documents
such as the comprehensive plans, school district strategic plans, I used the topics or headings addressed in each of the documents. For interviews, I used the interview questions or the topic of each interview question to provide the codes. For newspaper articles and direct observation notes and memos where there were no general headings, I provided a summary of the article using key words or findings to serve as the headers.


This process went through several rounds because the data was varied, large, and extended over 100 years. I was trying to find overarching themes, narratives, positions in each of the data sources that could tell the story of each of the municipalities and school districts. This process took time, and, as I poured through the data, my codes went from broad concepts to more distinct ideas and stories.

My frameworks were essential in this process of organizing the data and pushing the analysis. The new suburban methodology focused on the roles of both housing and schools in the contribution of segregated school districts. It was important that my codes
reflected the relationship between housing and schooling. For example, in addressing school board minutes one of my codes was titled “relationship with municipalities” and vice versa when addressing the municipalities’ comprehensive plans. Furthermore, utilizing the theoretical frameworks such as the political boundary theory, I created codes reflective of the distinct cultural, physical, and economic identities of each municipality. For example, I would label data that discussed the geographic boundary as “geographic boundary” and data that discussed the cultural narrative as “cultural narrative”. The politics of exclusion theory focused primarily on the ways, in which the municipalities and schools exclude and include populations, so my creation and analysis of the codes I noted how each subject matter, story, could be used to exclude or include populations from their boundaries.

Finally, I put the qualitative and quantitative evidence into a time line subdivided into three main categories zoning, housing, and schooling for each case in a Word document. I also analyzed tables and diagrams to determine the intersection of policy and demographic changes over time. Through this inductive and iterative process, I could construct findings that explained the demographic shaping of each case. I then constructed an individual case analysis for Cheltenham School District and Lower Merion School District utilizing the categories of zoning, housing, and schooling for each. Housing is incorporated into zoning and I could have just embedded housing into the zoning section. However, I wanted to emphasize the distinct, and unique role of housing in the subjugation and segregation of minority populations in these suburban communities. Through these individual cases, I could effectively compare the findings for both jurisdictions.
Positionality Statement

This study, both in its execution and findings, is a personal reflection of my background and experiences as a young Black girl growing up and attending school in the suburbs of Philadelphia, and how that experience shaped me as an educator, advocate, and researcher. One of the many questions that must be addressed in this study pertains to my bias as a former resident of Cheltenham Township as well as my belief that school integration and equity are the correct standards for how we should educate children. I do not hide the ball so to speak as to that bias of the latter, but it is important to reflect more deeply on my unique experiences that have grounded my perspective in this research.

As discussed in the introduction, my family moved to Cheltenham Township in the 1990’s. I was six years old, and my sister was four. At the time our neighbors were of diverse backgrounds, ethnicities, and religions. So, my sister and I played with the neighbors’ kids who were of different races, ethnicities and religions. These neighbors were also my classmates. However, during our educational journey we were tracked by ability level that changed the demographics of classes. Honors level classes were predominately White and Asian and the lower tracked classes were Black. I was tracked into the Challenge Program, or the Gifted and Talented Program while my sister was assigned to special education. For myself to be placed into the Challenge Program, my mom and a counselor had to advocate behind the scenes for years.

I remember issues of conflict regarding race and religious bias in and out of the classroom, been the subject of a racist epithet, and watched my school district delve into rough discussions on racism. From that experience I recognized the beauty and the pitfalls associated with creating a diverse educational experience. I learned to respect and
admire other cultures that differed from mine. I learned my own value, intelligence, and perseverance as a Black woman as I saw other teachers and peers learn to respect me. I also learned how to address head on and bounce back from moments of racial discrimination by students and faculty.

After high school I went to Penn State University on a full academic scholarship in the Bunton-Waller Fellows program. The scholarship was named after Mildred Bunton and Calvin Waller, the first African American female and male graduates of Penn State. The fellowship supports a broad array of high-achieving, first-generation, and multicultural students. It was at Penn State where I first took classes related to understanding the history of minority population groups such as African and Latino history and Race and Philosophy. As a political science major, I learned how other countries created and sustained government structures, and how they treated and mistreated their minority populations. Taking those classes helped me to put words and a language to the experiences that I had growing up Cheltenham. I was introduced to the writings and works of Black philosophers and leaders such as Alain Locke, W.E.B. DuBois, Frantz Fanon, Fannie Lou Hamer, Martin Luther King Jr., Malcolm X, and Nelson Mandela. They taught me about institutional and systemic racism, the different forms of discrimination that Black populations endured throughout the diaspora, and the effects of such discrimination on the current educational, social, and economic opportunities and lived experiences of Black populations. It was also at Penn State, where for the first time, I recognized that the US and Pennsylvania was not as racially and ethnically diverse as Cheltenham.
One of the most transformative experiences of my life was studying abroad in Cape Town, South Africa. There, I had a chance to study the effects of an oppressive governmental system, apartheid, and how the apartheid system used schooling to maintain segregation. I learned about the power of African student movements. Despite their education that taught that their language was inferior, their race was inferior, and their lives were inferior, they were able to fight against and overturn the apartheid system. This experience inspired me to want to understand the ways in which education policy can oppress as well as liberate. More importantly I wanted to see how I could play a role in the dismantling inequities of marginalized students in the US by being a teacher.

I joined the Atlanta Corps of Teach for America after college, where I became a high school social studies teacher in Fulton County, Georgia. It was in this space that I became aware of how geographic boundaries attached to race and income could determine the educational opportunities of students as well as the perceptions of the students within that geographic boundary. Fulton County is one school district divided into two sections, North Fulton and South Fulton County. Situated in the middle of North and South Fulton is Atlanta Public School District. The geographic separation was fascinating. To get from one section to the next would take 30 minutes to 1 hour in traffic. However, it was the cultural and demographic segregation that proved most problematic. North Fulton was more affluent, White, and boasted some of the best schools in the metropolitan area. While South Fulton had a majority Black, Latino, lower socio-economic population. Some of the South Fulton schools were deemed as some of the most “troubled” schools in the area. Through my experience as a teacher, it was apparent that the perception of Black students and therefore Black schools were negative
compared to White students and White schools. The existing segregation only helped to perpetuate and solidify such stereotypical and harmful beliefs.

I left the classroom and went to law school. I started at Penn State, Dickinson School of Law. I decided to study all I could on how law effects the educational opportunities of students. I studied the Equal Protection Clause of the 14th Amendment regarding school segregation and the effects of other institutions on schooling such as housing, health care, food, environment, criminal law, employment, and voting.

I then decided to obtain my PhD at Penn State, in the Educational Leadership department to understand how research can inform law. In graduate school, the events of Ferguson and the multiple shootings of unarmed Black men by the police had a huge impact on my lens as a researcher, advocate, and as a Black woman. The aftermath of the shooting led to a clash between Black residents and protestors of Ferguson, with police that exposed the suburban community’s history of racial and economic discrimination, exploitation, and demographic transformation. Ferguson has transformed from a majority White suburban community to part of an increasingly racially segregated St. Louis metropolitan community with high poverty, unemployment, segregated schools, poor student achievement and a suppressive police force (Rothstein, 2014a). Richard Rothstein (2014a) wrote a powerful report regarding Ferguson, arguing that Ferguson’s troubles were due to the “explicit intents of federal, state, and local governments to create racially segregated metropolises”.

Taking all of my experiences together as a Black student in a diverse, integrated northern suburban school district, a student and researcher studying legal systems and policies of segregation, and a teacher in a segregated school district, this dissertation
topic, seeking to understand how policies can create as well as dismantle segregation in schools and neighborhoods, has become a part of my DNA.

My identity and these experiences colored my opinions and approach in this study in two ways. First, my residency status and relationship with Cheltenham and Lower Merion effected how I approached data collection in these sites. Since I grew up in Cheltenham, initially I was more comfortable speaking with Cheltenham residents, municipality and school district personnel, no matter their race, and attending Township programs and meetings than with personnel in Lower Merion. In Cheltenham I felt as if I had open access to meetings and people. I began my inquiries into Cheltenham’s history and policies by simply walking into the school district or municipality building and talking with the personnel at the front desk to get access to anyone who had time to talk with me. This approach proved to be successful in part because they viewed me as a product of their community. The home-field advantage, I believe, granted me more opportunities to meet with and talk with new respondents. Furthermore, in Cheltenham I interacted with people that were either Black, lived on my block, or had a child, grandchild, niece, or nephew that was in my high school class. I never felt like an outsider.

Prior to my dissertation study, my physical interactions with Lower Merion were limited to the shops, stores, and restaurants along the Philadelphia/ Lower Merion boundary on City Ave. I did not know anyone who lived there, and due to the extreme wealth and racial separation between Cheltenham, Philadelphia, and Lower Merion, I felt that I did not belong. Due to my outsider position, I had to use different methods to gain access to the district and municipality. I had to elicit education and familial networks and
contacts who knew someone that used to work or currently worked in Lower Merion to start the process. I embarked on a lot of background research and made inquiries via phone call or e-mail to determine who would be a good arbiter of information regarding district and municipal practices. Once I got my foot through the door, I was surprised at my success in getting district and municipality personnel to talk with me. My surprise was rooted in my engrained fear that no one would want to talk to an outside researcher, who is Black, discussing sensitive matters concerning the Township’s race and class inequities in past and present education and housing policies.

To conduct this study objectively I had to quickly acknowledge and assess my diametrically divergent biases towards my sites. In one site, I was comfortable because it was my home, while in the other site I felt like an outsider and was uncertain as to how district and municipality personnel would perceive my study and me. To address these sites effectively I used multiple data sources in different forms to get a well-rounded pronounced depiction of these districts. To remedy my feelings toward Lower Merion, I made multiple visits. I clocked in hours at the school district office, and the municipal building, as well as took hour long walking and driving tours around the Township. I spoke with historians, residents, school district leaders, and municipality personnel. I made time to discuss matters pertaining to my study as well as general “get to know you” conversations about family and background. Within the two years that it took to conduct this dissertation, those feelings of uncertainty and fear subsided. In the case for Cheltenham, I maintained my overall comfort with my hometown but my other data sources, besides interviews, helped me understand Cheltenham outside of my own personal experiences.
Second, as a Black woman, I do not look at inquiries regarding racism and oppression as a theoretical exercise. My life, the livelihood of my family, my students, and other marginalized/oppressed populations are forever shaped by discriminatory education and housing policies and practices. My lens as a researcher is therefore centered on shedding light on the continued inequities and barriers embedded in our systems and institutions so that we can remove them to create better opportunities for all.

**Conclusion**

In this chapter I described the methodological choices and rationale used for this dissertation to answer my research questions. I conducted a sequential mixed method multiple embedded case study using a methodological approach that includes both housing and education policy analysis. Through purposive sampling I selected two inner ring Montgomery County, Pennsylvania suburban school districts, Lower Merion School District and Cheltenham School District because they represent different school district-municipality typologies and have demographically diverged from the other within 54 years. Furthermore, I also described the data and analysis to obtain my findings. The next five chapters display my findings regarding federal, Pennsylvania, and local jurisdiction policy decisions that contribute to the racial and economic segregation between school districts in Montgomery County, Pennsylvania.
Chapter Four

Federal and Pennsylvania Context: Addressing De Facto Segregation

Introduction

Current federal housing and school policy has fallen short of the promise presented in *Brown v. Board of Education* (1954) to dismantle the discriminatory practice of “separate but equal” in the field of public education (*See Plessey v. Ferguson*, 1896). Supposing that de facto segregation lacks the intent to segregate ignores the ways in which jurisdictions have practiced residential segregation, geographically dividing neighborhoods on the basis of race through discriminatory housing policies (Rothstein, 2017). The Supreme Court’s validation of residential segregation has made combating school segregation between jurisdictions more of an uphill battle (*See Parents Involved*, 2007).

Even civil rights housing policies such as the Fair Housing Act of 1968 misses the mark. The Fair Housing Act invalidates racial discriminatory housing practices, but “racially neutral” policies that divide jurisdictions on the basis of income still perpetuate conditions of racial inequality and segregation between jurisdictions (Lichter et. al., 2015). Minority families are often blocked from suburban spaces because they cannot afford homes in these communities and/or racially steered from these communities (Bonilla-Silva, 2017; Massey et. al. 2015; Poverty & Race Research Action Council (PRRAC) & National Fair Housing Alliance, 2014; Galster, 1990). The purpose of these federal civil rights policies on its face are to actively desegregate communities and schools by invalidating vestiges of housing and school discriminatory practices, but how
these policies have been interpreted and implemented have impeded efforts to truly
desegregate. If the federal government has missed the mark by validating de facto
segregation, then what role does the state play?

The Supremacy Clause of the U.S. Constitution holds that the federal government
in exercising its powers under the Constitution is not subjected to state law (US
Constitution, Article IV, Section 2). Therefore, “state provisions may not undercut
federal provisions” (Gormley, 2006, p. 213). However, our federalist system allows the
state to give its citizens more rights under its state constitution or state laws beyond what
is guaranteed by the federal Constitution (Gormley, 2006). Pennsylvania has chosen to
reach beyond the federal interpretation of what constitutes a constitutional violation of
segregation, opting to address de jure and de facto segregation equally (Shuster, 2011).

This chapter first examines the creation and limitations of federal housing policy
to combat segregation between jurisdictions. Furthermore, this chapter further examines
Pennsylvania’s housing and education policies, specifically the Pennsylvania Human
Relations Act (PHRA) (1955) and the Municipalities Planning Code (MPC) (1968).
These two state laws and subsequent case law provides the contextual framework to
examine the role, power, and limitations of local municipalities and school districts in
Pennsylvania to enact policies that promotes or hinders socioeconomic and racially
integrated communities.

**Federal Housing Policy: Mitigating Segregation Between Jurisdictions**

Rampant discriminatory housing policies and conditions prior to 1968 led to
extreme racial disparities and conflicts within our metropolitan areas. The National
Advisory Commission on Civil Disorders (Kerner Report) (1967) concluded, “[o]ur
nation is moving toward two societies, one [B]lack, one White – separate and unequal” (p. 1). The report found that segregation and poverty has created a racial ghetto and that “[W]hite society is deeply implicated in the ghetto. White institutions created it, [W]hite institutions maintain it, and [W]hite society condones it” (p. 1). One year later, President Johnson signed the Fair Housing Act of 1968, which prohibited discrimination in the rental, sale, and financing of housing, and in brokerage services, on the basis of race, color, religion, sex, or national origin (Lamb, 2005).

The U.S. Department of Housing and Urban Development (HUD) is tasked with enforcing this Act. HUD has sanctioned programs to provide and develop affordable housing for low-income populations as well as stabilize communities that suffer from foreclosures and abandonment (Edson, 2011; HUD, 2015b; Lamb, 2005). Yet HUD did not have any method of enforcement until the 1988 Amendments of the Fair Housing Act of 1968 (Lamb, 2005). The 1988 Amendments\textsuperscript{14} expanded the Justice Department’s jurisdiction to bring a discriminatory housing suit on behalf of victims in federal court (HUD, n.d.).

Prior to 1988, HUD’s involvement was merely “investigation” and “conciliation” of discriminatory housing claims (HUD, n.d.). This is important to note, because a positive law without enforcement can lead to further harm. Despite the significance of an existing Fair Housing Act, for its first twenty years, the law had no teeth and therefore those that have been discriminated against due to their race, color, religion, sex, or national origin had virtually no protections.

\textsuperscript{14} The Fair Housing 1988 Amendments also extended the protections to persons with a disability, families with children, and pregnant women (Ritzdorf, 1996; HUD, n.d).
Improving Residential and Educational Outcomes

The passage of the Fair Housing Act of 1968 promoted social science research regarding the impact of residential segregation on the educational and economic opportunities of poor minority students. Alleviating zoning policies and increasing the opportunity for low-income housing to access affluent neighborhoods reduces segregation in highly fragmented metropolitans and reduces the achievement gap between populations (Rothwell, 2012; See also Hanushek & Yilmaz, 2012; Schwartz, 2010).

In the Supreme Court case *Hills v. Gautreaux* (1976), a federal court may order an area-wide remedy in a metropolitan area that extends to the suburbs, in cases where HUD knowingly funds a racially discriminatory city housing authority. This case led to the Gautreaux program in Chicago, which measured the educational and social effects of placing public housing in affluent, majority White communities for Black students (Rosenbaum, 1995). This twenty-year study found that Black children who grew up in suburban neighborhoods were far more likely to not drop out of school, attend a four-year college, obtain employment, make friends with Whites, than Black children who stayed in public housing in the city (Rosenbaum, 1995).

Other programs, such as the Moving to Opportunity (MTO) program developed by HUD in the 1990’s randomly assigned public housing participants to three categories: no housing assistance, normal Section 8 voucher assistance, and housing assistance for those who move to communities with poverty rates of 10% or lower (Rothwell, 2012). Early research on the effort was found not to have any significant positive neighborhood effects over time, specifically for “male youth after an average of five years” (Katz,
Kiling, & Liebman, 2007; Sanbonmatsu, Kiling, Duncan, Brooks-Gunn, 2006). In response, other scholars argue that a short period living in affluent neighborhoods is unlikely to overcome a lifetime harm of living in poor neighborhoods (Wodtke, Harding, & Elwert, 2011). However, longer-term effects proved positive. Chetty, Hendren, and Katz (2016) found that MTO low-income students who moved to a low-poverty neighborhood before the age of 13 increased college attendance and earnings.

Furthermore, in examining five million families who moved across counties in the US, Chetty & Hendren (2015) found that the outcomes of poor children whose families moved to better neighborhoods improved in proportion to the time they spent living in those communities compared to poor families who moved to worse neighborhoods. Spatial differences between residential boundaries have heightened racial disparities across generations. The study argues that areas with a larger Black population also tended to have lower rates of upward mobility, and estimated that one-fifth of the income gap between Blacks and Whites are attributed to the counties in which they grow up (Chetty & Hendren, 2015). Such studies have measured quantitatively the benefits of poor students moving to affluent suburban counties throughout the US, but fail to acknowledge the inequalities existing between the municipalities and school districts of affluent counties with multiple school districts.

**Limitations in Mitigating Segregation**

Despite the urgency of social science research and federal policies to combat the divide that exists between minority and White populations, governmental and private actors continue to foster policies that segregate. Economic protections were not included in the Fair Housing Act, nor will government discrimination based on income typically
survive constitutional review under the 14th Amendment, Equal Protection Clause (EPC). Even though the Court has interpreted an intent and disparate impact standard in the Fair Housing Act (TDCHA v. ICP, 2015) suburban communities continue to enact housing policies that segregate on the basis of class and income that excludes populations on the basis of race.

During the Nixon Administration, George Romney, the HUD Secretary attempted to implement a suburban desegregation-housing program, titled Open Communities. The program connected HUD funding to suburban communities that developed affordable housing to combat racial and class segregation in metropolitan areas (Massey, 2015; Roisman, 2007). Secretary Romney initially targeted suburban communities that had high employment rates but few or no affordable housing (Massey, 2015). This policy faced opposition by President Nixon, stating “this country is not ready at this time for either forcibly integrated housing or forcibly integrated education” (Mason, 2014, p. 149). President Nixon would eventually nix this suburban desegregation policy thus allowing residential segregation or de facto segregation to flourish between jurisdictions (Mason, 2014). Further, the Court also held that a community may exclude publicly assisted housing from HUD through voter referendum, meaning that suburban

15 The EPC has different levels of scrutiny from which federal courts determines whether state policy or laws violate the Equal Protection Clause. Scrutiny depends particularly on two factors: whether the policy/law burdens a protected class of people and/or whether the policy/law burdens certain fundamental rights (ex: voting, interstate travel), articulated in the U.S. Constitution. Racial, national origin, religion, and alienage classifications under the Equal Protection Clause must survive strict scrutiny. To withstand strict scrutiny analysis, the government’s use of race must serve a compelling interest and employ narrowly tailored measures that further that interest (Gratz v. Bollinger, 2003). To withstand intermediate scrutiny, the government’s use of gender must serve an important interest by means that are substantially related to that interest (Craig v. Boren, 1976). The lowest level of scrutiny is rational basis. The government just needs a legitimate reason to discriminate. Classifications falling under rational basis are anything that is not covered under strict scrutiny and intermediate scrutiny, such as income (San Antonio v. Rodriguez, 1974; United States v. Carolene Products Co., 1938). Governments usually withstand most challenges of discrimination under the rational basis standard.
communities do not have to accept federal funding at all and do not have to develop public housing (*James v. Valtierra*, 1971).

According to the 1991 and subsequent 2005 report by the Advisory Commission on Regulatory Barriers to Affordable Housing, resistance to affordable housing continues by residents and public officials through the implementation of “exclusionary, discriminatory, and unnecessary regulations” and policies (HUD, 1991, 2005). Municipalities maintain complex regulatory frameworks that make it difficult to build a range of affordable housing in some communities (HUD, 2005). Due to the limitations of the current Fair Housing Act in protecting against income discrimination in housing, Richard Kahlenberg (2017) in his Century Foundation Report is calling for an Economic Fair Housing Act that would make illegal exclusionary zoning practices pertaining to banning multifamily housing buildings, town homes and modest lot size housing structures (p. 29).

Education policy can allow for school segregation to proliferate if it’s grounded in residential segregation (de facto segregation). Unfortunately, housing segregation legislation, and case law tells a rather conflicting story in the fight for a more equitable and just society. Federal laws require only non-discrimination in housing on the basis of race, color, national origin, sex, and religion” but policies have strayed away from actively forcing suburbs to integrate economically (Lamb, 2005). Our policies continually articulate this specific ideology: if you cannot afford to move to the suburbs, then you are not welcome.

For middle income Black families, this ideology is even more complex. Due to discriminatory housing policies impacting the wealth and opportunities of Black families,
Blacks, are more likely to live in lower-income neighborhoods compared to Whites with similar incomes (Shapiro, 2017; Sharkey, 2014; Reardon, et. al. 2015). Income and even wealth is not the sole indicator of suburban access. Lest not forget that racial discrimination specifically in the suburbs have led to preferences of suburban communities based upon racial composition (See Orfield, 2001a). Shapiro (2005) noted that Blacks are less likely to move out of integrated or mixed communities, while White families are more likely to stay in predominately White or move to predominately White communities.

**The Pennsylvania Human Relations Act: Pennsylvania De Facto Segregation Policy**

Unlike the federal government, Pennsylvania is recognized as having some of the most progressive policies combating de facto discrimination in the country. Pennsylvania has been ahead of most states and the federal government by asserting an education and housing policy that equally protects against de jure segregation and de facto segregation through the Pennsylvania Human Relations Act (PHRA) (1955) (Shuster, 2011).

**History of the Pennsylvania Human Relations Act (PHRA)**

The Pennsylvania Human Relations Act was originally titled the Pennsylvania Fair Employment Practice Act (1955) and prohibited discrimination in employment. In 1961, the Pennsylvania Legislature issued amendments expanding the provisions of the Act to include prohibitions against discrimination in housing and public accommodations, such as schools. The PHRA protections predate the federal Civil Rights Act of 1964 and the Fair Housing Act of 1968 (Shuster, 2011). In 1974, the legislature amended the Act adding protections against discrimination on the basis of
handicap or disability. The federal government followed suit 16 years later when it 
enacted the Americans with Disabilities Act (ADA) in 1990 (Shuster, 2011).

In its current iteration, the Pennsylvania Human Relations Act “prohibits 
discrimination based on race; color; religious creed; ancestry; age (40 and over); sex; 
national origin; familial status (only in housing); handicap or disability; and the use, 
handling or training of support or guide animals for disability” in employment, housing, 
commercial property, education and public accommodations (1955). The Act created the 
Pennsylvania Human Relations Commission (PHRC) (1955) to enforce the Pennsylvania 
Human Relations Act and the Pennsylvania Fair Educational Opportunities Act, which 
prohibits discrimination to postsecondary education and secondary vocational and trade 
schools. The PHRC protects the rights of complainants under both state and federal law. 
The law also allows the PHRC to educate the public on the dangers of discriminatory 
education, employment, and housing policies to promote policies that “foster equal 
opportunity” and to “address incidents of bias” (PHRA, n.d.). However, the PHRA’s 
most important contribution is its extension past the federal government’s proclivity to 
ignore constitutional violations to de facto segregation practices.

De Facto Segregation Case Law

The Pennsylvania courts have interpreted the PHRA to protect against all forms of 
segregation including de facto segregation practices (Pennsylvania Human Relations 
Commission v. Chester School District, 1967). Section 2 of the PHRA addresses the 
dangers of segregation in the Commonwealth:

(a) The practice of policy of discrimination against individuals or groups 
by reason of their race, color, familial status, religious creed, ancestry, 
age, sex, national origin, handicap or disability, use of guide or support 
animals . . . is a matter of concern of the Commonwealth. Such
discrimination forms domestic strife and unrest, threatens the rights and privileges of the inhabitants of the Commonwealth, and undermines the foundations of a free democratic state. The denial of equal employment, housing and public accommodation opportunities because of such discrimination, and the consequent failure to utilize the productive capacities of individuals to their fullest extent, deprives large segments of the population of the Commonwealth of earnings necessary to maintain decent standards of living, necessitates their resort to public relief and intensifies group conflicts, thereby resulting in grave injury to the public health and welfare, compels many individuals to live in dwellings which are substandard, unhealthful and overcrowded, resulting in racial segregation in public schools and other community facilities, juvenile delinquency and other evils, thereby threatening the peace, health, safety and general welfare of the Commonwealth and its inhabitants.

(b) It is hereby declared to be the public policy of this Commonwealth . . . to assure equal opportunities to all individuals and to safeguard their rights to public accommodation and to secure housing accommodation and to secure housing accommodation and commercial property regardless of race, color, familial status, religious creed, ancestry, age, sex, national origin, handicap or disability, use of guide or support animals . . .

(c) This act shall be deemed an exercise of the police power of the Commonwealth for the protection of the public welfare, prosperity, health and peace of the people of the Commonwealth of Pennsylvania. (1961)

The Chester court held that “. . . the legislative conclusion that racial segregation in the public schools, whatever its source, threatens ‘the peace, health, safety and general welfare of the Commonwealth and its inhabitants’” (1967, p. 171).

Continual segregation in schools was perceived as a threat towards the purpose of ‘common schools’ in Pennsylvania. The PHRC’s 1968 “Desegregation Guidelines for Public Schools” the Commission recognized that:

The common school has long been viewed as a basis social instrument in attaining our traditional goals of equal opportunity and personal fulfillment. The presence in a single school of children from varied backgrounds is an important element in the preparation of young people for active participation in the social and political affairs of our democracy.” (Uniontown Area School District v. PHRC, 1973, p. 158)

Agreeing with the Commission, Pennsylvania courts have overwhelmingly solidified the authority of the PHRC to order racially conscious assignment of students to correct de

This call to arms to remedy de facto segregation did not just focus on school district efforts but on government entities such as municipalities and housing authorities in perpetuating residential segregation and therefore perpetuating segregated schools. The Pennsylvania Common Pleas court of Dauphin County in Huber v. PHRC (1967) recognized that the PHRA was a proper exercise of the police power to prohibit discrimination in housing and did not violate the Equal Protection Clause (See City of Pittsburgh Commission on Human Relations v. DeFelice, 2001). In PHRC v. Chester Housing Authority (Pa. 1974), the PHRC filed a complaint alleging that the Chester Housing Authority maintained racially segregated housing projects in violation of the PHRA, arguing that the racial segregation “aided and abetted” the existing racial segregation in the Chester School District. The Supreme Court of Pennsylvania ordered that the Chester Housing Authority cease and desist from segregating the public housing projects, and also required the Housing Authority to work with the Chester School District to draft a plan to correlate the placement of tenants with school age children to facilitate the desegregation of the school district. Recent housing cases such as in McGlawn v. PHRC (2006) held that reverse redlining, the practice of extending credit on
unfair terms to specific geographic areas due to income, race or ethnicity is a recognized cause of action that violates the PHRA.

**Limitations in Repudiating De Facto Segregation in Pennsylvania**

However, despite Pennsylvania’s law to combat de facto segregation, court decisions have curbed progress towards such a goal.

**Philadelphia school desegregation case.** The *PHRC v. School District of Philadelphia* (SDP) case spanned four decades without truly upending school segregation within the School District. Beginning in 1972, the PHRC targeted the School District of Philadelphia as a district unlawfully segregating students on the basis of race and required the District to correct de facto segregation within its schools (*PHRC v. SDP*, 1972, 1973). A series of Pennsylvania court decisions between 1972-2009 showed the back and forth between the school district, the PHRC, and the court, all culminating into the ultimate rejection of desegregating schools as a goal and replaced with the mandate to improving the educational opportunities within segregated schools (Nelson & Tyler, 2017; Milby, 1996).

After twenty years of deferring to the PHRC to implement and enforce desegregation policy and giving SDP delays, the Commonwealth Court held that the PHRC has failed to “demonstrate that mandatory desegregation measures were feasible” and subsequently rejected busing and a metropolitan strategy (including suburban communities) (*PHRC v. SDP*, 1993, p. 183). By 1994, the Commonwealth Court shifted the focus from remedying desegregation to guaranteeing a more equitable outcome in student achievement within SDP schools (*PHRC v. SDP*, 1994, p. 311). The case formally ended in 2009, with a consent agreement between SDP, parent groups, and the
PHRC based on a SDP strategic plan to improve the academic achievement of minority students in Philadelphia.

During the time frame of the case, the city of Philadelphia its school district had experienced extreme White flight to the suburbs, impacting the composition of the city as a segregated, majority minority jurisdiction (US Census, 1960-2010; ACS, 2014).

Furthermore, the school district’s history with chronic financial issues and concerns of educational quality led to a state takeover of schools in 2001, and the establishment of the School Reform Commission\textsuperscript{16} to serve as appointed policy directors of the School District of Philadelphia (Education Voters of Pennsylvania, n.d.). The initial hope of racial and socioeconomic integration as well as the provision of equitable educational opportunities in the School District of Philadelphia have had detrimental setbacks due to the district’s hundreds of millions of dollars debt burden due to a series of misuse of funds and state cuts, the closing of traditional public schools, district personnel layoffs, and the rise of charters that competes with traditional public schools for limited resources (Kotok, Reed, Kucsera & Orfield, 2015; Caskey & Kuperberg, 2014).

\textbf{Pittsburgh desegregation case.} During the 1960s, The PHRC also required Pittsburgh to desegregate its school district in an extended legal battle that left Pennsylvania’s second largest school district still segregated (Lindstrom, 2016). Desegregation efforts in Pittsburgh began in the 1960s when achieving racial balance became a factor in open enrollment transfers to schools in the city (Chandler, Haulk, & Guilbon, 1997, p. 10). After a review of the racial composition of the city schools, the PHRC stepped in and required the district to submit a desegregation plan in 1968

\textsuperscript{16} The School Reform Commission consists of three members appointed by the Governor and two members appointed by the Mayor (Education Voters of Pennsylvania, n.d.).
(Chandler et. al., 1997). Like in Philadelphia, a series of extensions would be granted to Pittsburgh city schools by the court to implement desegregation plans, only to be rejected by the PHRC, and protested heavily by parents who did not want their children to be bused or transferred from their neighborhood schools (Kotok et. al, 2015; Chandler et. al, 1997).

In 1979, by threat of state takeover, the district submitted a plan that relied on magnet schools, which was designed to attract students throughout the city to desegregate. Even though the PHRC rejected the plan, the court allowed the plan to be implemented (Chandler, et. al. 1997). The magnet school was expanded to include racial quotas. However, by the end of the 1980s, a declining tax base caused budgetary problems that placed busing in serious jeopardy in light of calls pushing for a return to geographically bounded neighborhood schools (Kotok, et. al. 2015; Chandler et. al., 1997).

In 1996, the Pennsylvania Legislature passed a bill to prevent the PHRC from forcing schools to bus and limited when courts could propose busing as a remedy to desegregate (Chandler, et. al. 1997). Governor Tom Ridge signed the bill into law, characterizing busing as “a well-intentioned but failed experiment” (Chandler et. al., 1997, p. 4).

These protracted cases show how despite a law that combats forms of de facto segregation, constant delays, excuses, lack of resources and changes in ideology can make the goal to desegregate in Pennsylvania an unrequited one.
The Municipalities Planning Code: Pennsylvania’s Fragmented Jurisdictions

Pennsylvania’s pension for fragmented jurisdictions also impedes the goal for desegregation. Pennsylvania is the second most fragmented state in the country, with 67 counties, 500 school districts, and over 2,562 municipalities (boroughs, towns, and townships) each endowed with regulatory power to create and implement policy (Maciag, 2012; Municipalities Planning Code, 1968; Pennsylvania Public School Code, 1949). The Pennsylvania Municipalities Planning Code (MPC) provides the legal doctrine supporting fragmentation as well as Pennsylvania’s fair share doctrine eliminating exclusionary zoning policies.

Fragmentation Increases Inequities in Pennsylvania

The amount of independent fragmented jurisdictions in Pennsylvania has led to complaints regarding the inefficiency in government resources and control, economic instability, and wasteful spending (Regionalization, n.d.). Every municipality is independently investing in roads, physical infrastructure to support public services, schools, and safety (Regionalization, n.d.). These small fragmented districts often compete over resources, and consistently raise taxes every year to support the services that they provide, while at the same time state support decreases (Regionalization, n.d.).

Pennsylvania’s changing demography and fragmentation also lead to inequities in regard to state funding and priorities. Like most states, Pennsylvanians are moving away from the cities and older townships (1st Class Townships) towards newer outer townships (Brookings Institute, 2007). The outer suburban townships now constitute 42% of the state’s population. Due to the growth, the outer townships are receiving 1.2 billion dollars more in road and bridge spending than in older cities and townships. Outer
townships are receiving 58% of classifiable spending in 2002, even though they only represent 42% of the state’s population (Katz, 2007). Older cities and older suburbs with larger percentages of low income and minority populations are struggling financially (Katz, 2007).

**Consolidating districts.** These issues related to fragmentation and the inequities with spending have led to calls for consolidation. According to Pennsylvania law on municipalities, a consolidation is the combination of two or more governmental entities, terminating the existence of each to create a new entity (Act 90, 1994; Pennsylvania School Boards Association (PSBA), 2009). A merger is the combination of two or more governmental entities, leaving behind all but one surviving entity (PA Act 1990, 1994; PSBA, 2009). For school districts, mergers require an affirmative vote of merger from each of the school districts’ school boards (Pennsylvania Public School Code, 13 P.S. 2-224, 1949; PSBA, 2009).

In recent history Pennsylvania consolidated school districts twice: in 1955 from 2,700 separate school districts to 1,900 and in 1962 down to 600 (PSBA, 2009). Currently there are 500 separate school districts (The Associated Press, 2009). In 2009, former Governor Rendell attempted to consolidate the school districts from 500 to 100 to reduce the bureaucracy and the amount of local property taxes that residents pay especially in a state where enrollment has dropped throughout (The Associated Press, 2009; Murphy, 2009). In a budget address to the Legislature, Governor Rendell argued, There is nothing sacrosanct about the need to maintain 500 separate school districts across the state—each with its own staggering, and growing, administrative costs. In Maryland, for example, they have just 24 school districts, all at the county level, and Maryland enjoys student achievement levels that are among the highest in the nation.” (The Associated Press, 2009)
However, the governor’s effort to consolidate failed (Boser, 2013). There was a renewed call in 2016 to conduct a statewide report on school district consolidation in the Pennsylvania Legislature (Vereeb, 2016).

On the other side of the consolidation argument, a Pennsylvania School Boards Association (PSBA) report on the 2009 school consolidation plan argued that financial savings from mergers or consolidations are not documented and that consolidations create the potential for negative impacts on student achievement. The report focused specifically on the impact of consolidation on smaller districts, stating that these districts would lose income from facilities, increase expenses in providing for transportation, and depersonalize the educational experience of students and families (Mekeel, 2016; Hyland, 2013; PSBA, 2009). PSBA argues that if Pennsylvania wants to reduce the number of school districts they needed to encourage mergers instead of consolidation, but it must provide funding for “front end costs, technical assistance for merger studies, curriculum alignment, and cover administrative costs” (PSBA, 2009, p. 15).

What was not discussed in the PSBA report was the way in which consolidation or mergers could have real implications to segregate or desegregate racially and socio-economically isolated school districts within a metropolitan region. For example, the metropolitan Pittsburgh suburban school district of Woodland Hills was a byproduct of the 1962 consolidation effort (Act 299) (See Hodge, 2017). During this time, in the Pittsburgh area, neighboring majority White school districts decided to either stay independent or merge with other districts that they perceived to be desirable, while leaving behind three high minority school districts (Hodge, 207). The Allegheny County Board of Education ordered the consolidation of the three districts with the highest
concentration of Black and poor students in 1971. The consolidated district was renamed the General Braddock Area School District. Since such consolidation resulted in a segregated school district, parents sued the state in 1971 (*Hoots v. Pennsylvania*, 1971).

*Hoots v. Pennsylvania* was also a lengthy federal court case that led to five districts merging to form the desegregated Woodland Hills district in 1981. Woodland Hills was under federal court oversight to maintain integration between the schools; however second-generation segregation came to the forefront in the 1980’s and 90’s (Kotok, 2015; Hodge, 2017). Levels of racial inequities in the form of curricular tracking, discipline practices, and school staffing increased (Kotok et. al. 2015). The court eventually eliminated tracking in Woodland Hills. By 2003, Woodland Hills was declared unitary and therefore no longer under federal court supervision to oversee desegregation plans (Hodge, 2016). During this process, the district has experienced extreme White flight and reduction in enrollment. The Black student population is still overrepresented in school suspension and expulsions and underrepresented in gifted and talented programs (Kotok et. al., 2015). However, there is evidence that all students are exposed to a rigorous math curriculum (Kotok, et al. 2015). Woodland Hills show that creating desegregated school districts must also coincide immediately with equity policies to provide for the educational opportunities of students of color within the district.

The migration and fragmentation of metropolitan areas in Pennsylvania only perpetuate the growing segregation between jurisdictions and low- to moderate-income minority and affluent White populations (Kotok, et. al., 2015). The consolidation discussion shows how deeply entrenched local control and therefore the political, social,
and economic fragmentation in Pennsylvania. The Municipalities Planning Code of 1968 codifies this fragmentation by laying out the legal powers of jurisdictions in zoning.

**Structure, Power, and Relationships of Pennsylvania Jurisdictions**

To truly understand the depth of fragmentation in Pennsylvania it is important to discuss the legal powers of school districts and municipalities. Municipalities are permitted to enact zoning ordinances under their police powers asserted for the public welfare (*Village of Euclid v. Ambler Realty*, 1926). The Pennsylvania Municipalities Planning Code (MPC) (1968) delegates land use power to the Commonwealth’s municipalities. Under the MPC each municipality has the general power to enact, amend, and repeal zoning ordinances and to implement any comprehensive plans as long as it complies with the MPC. Zoning ordinances reflects the policy goals of the community and it considers the character, needs, and the nature of the municipality while guiding housing, facilities, resources, and overall growth development (MPC, 1968). A municipality’s zoning ordinance is presumed to be valid and therefore requires the challenging party to prove its invalidity (*See National Land & Investment Company. v. East town Twp. Board of Adjustment, Kohn*, 1965, p. 607). For an ordinance to be considered constitutional, zoning must not be arbitrary or unreasonable and must bear a “substantial relation to the public health, safety, morals, or general welfare” (*Euclid*, 1926).

Pennsylvania’s zoning power is predominately concentrated within municipalities, not the county. The county and municipalities each create zoning ordinances and comprehensive plans, however the MPC makes clear that the county plans serve as merely recommendations or guides to municipalities within the county.
The only time that the county plan has authority over municipalities within the county is when municipalities do not have a zoning ordinance in effect. The moment a municipality enacts a zoning ordinance it repeals the authority of a county ordinance or plan (MPC, Section 602, 1968).

This dynamic between municipalities and counties are instrumental to the fragmentation of metropolitan areas. Counties (specifically in metropolitan areas) can serve socioeconomic and racially homogeneous and heterogeneous municipalities alike that can have far reaching implications for desegregating housing and schools between municipalities (See the state of Maryland’s countywide system; Rothstein, 2017). However, the hierarchical power structure in Pennsylvania adheres to individual municipalities having land use authority, instead of counties (MPC, 1968; Rowan, 2007). Individual municipalities can choose to adhere to county authority in fair housing measures. In Montgomery County, PA, most municipalities have agreed to allow the County to distribute HUD’s Community Block Development Grant (CBDG) funds. Still, municipalities have the authority to opt out or opt in.

In terms of the relationship between school districts and municipalities, both are independent of the other even though the residents of each municipality determine the student body of each school district. According to the Pennsylvania Public School Code of 1949, the 500 Pennsylvania school boards have the power to create schools, close schools, set school enrollment zones, tax residents, create curriculum, and hire and fire school district personnel. The MPC (1968) discusses the requirement of municipalities to plan for institutional spaces such as schools, but the municipality’s comprehensive plan merely serves as a recommendatory tool for schools. In Section 305 of the MPC (1968),
concerning the “Legal status of Comprehensive Plans within School Districts”, the law states that

Any proposed action of the governing body of any public-school district located within the municipality or county relating to the location, demolition, removal, sale or lease of any school district structure or land shall be submitted to the municipal and county planning agencies for their recommendations [emphasis added] at least 45 days prior to the execution of such proposed action by the governing body of the school district.

Furthermore, until 2012, municipalities were not required to notify school districts about various housing and zoning decisions that effects student enrollment. The MPC enacted a 2012 amendment requiring that each month municipalities must notify in writing the superintendent of a school district in which a plan for a residential development was finally approved by the municipality during the preceding month. The notice shall include, but not limited to, the location of the development, the number and types of units, and the expected construction schedule.” (MPC, 2012, No. 97, Section 508.1)

Even though the MPC requires notice, the law does not require any form of collaboration between the two political entities.

An analysis of the MPC shows a structure of various autonomous fragmented jurisdictions with an array of powers operating independently and co-dependently with the other. However, it is clear that in Pennsylvania, the municipality, not the county has the overarching power to control the use of land within the municipality, and the school board sets their own controls of the land, the buildings, and the students within their domain.

**Pennsylvania De Facto Fair Share Doctrine**

Despite its penchant for fragmentation, the Pennsylvania has a robust case law against municipality practice of exclusionary zoning, which is more pronounced and developed than most states. The following states have legislation or a fair share legal
doctrine: California, Connecticut, Massachusetts, Michigan, New Hampshire, New York, Oregon, Rhode Island, Virginia, and Washington, and New Jersey (Rowan, 2007, p. 1278). The section of the MPC that primarily impacts exclusionary zoning is Section 604 (4), which recognizes one major purpose of zoning:

To provide for the use of land within the municipality for residential housing of various dwelling types encompassing all basic forms of housing, including single-family and two-family dwellings, and a reasonable range of multifamily dwellings in various arrangements, mobile homes and mobile home parks, provided, however, that no zoning ordinance shall be deemed invalid for the failure to provide for any other specific dwelling type.

The MPC articulates a policy that encourages the multiple types of housing. Case law defines exclusionary zoning as a municipality’s failure to include a fair share of multiple forms of housing to impede and stem property growth in the area (See Surrick, Pa. 1977).

Pennsylvania’s neighbor, the state of New Jersey’s model fair share doctrine directly influences Pennsylvania’s fair share doctrine. In the Southern Burlington NAACP v. Township of Mount Laurel (1975) decision, the Supreme Court of New Jersey placed a social justice emphasis on limiting economic housing segregation. The New Jersey Supreme Court held unconstitutional a zoning ordinance issued by an affluent suburban municipality that excluded almost all low-to moderate-income individuals from obtaining housing by failing to provide a fair share of housing of multifamily housing. The ordinance only allowed the development of single-family homes. The New Jersey Supreme Court took the time to discuss the real inequities and dire conditions low-income city residents must endure due to suburban districts exclusionary zoning ordinances. The court rationalized:

These people have great difficulty in obtaining work and have been forced to remain in housing which is overcrowded, and has become more and
more substandard and less and less tax productive. There has been a consequent critical erosion of the city tax base and inability to provide the amount and quality of those governmental services—education, health, police, fire, housing and the like—so necessary to the very existence of safe and decent city life. This category of city dwellers desperately needs much better housing and living conditions than is available to them now, both in a rehabilitated city and in outlying municipalities. They make up, along with the other classes of persons earlier mentioned who also cannot afford the only generally permitted housing in the developing municipalities, the acknowledged great demand for low and moderate income housing. (p. 173)

*Mt. Laurel II* (1983) initiated the creation of a statewide Council on Affordable Housing Agency (COAH). COAH required every municipality to develop a fair share of affordable housing (Cohen, 2012; Rothwell, 2012). This fair share policy encourages developers to develop fair housing by providing incentives to set aside a share of the units for low-to-moderate income families. Recently, New Jersey Governor Chris Christie attempted to abolish COAH, leaving municipalities to make their own “righteous” decisions on affordable housing (Cohen, 2012; Semuels, 2015). In 2013, the New Jersey Supreme Court declared Governor Christie’s action to be illegal. In 2015, the New Jersey Supreme Court then ruled that the lower courts would take over the regulation of affordable housing in New Jersey (Semuels, 2015; Johnson, 2015).

Pennsylvania has attempted to follow suit regarding articulating a fair share doctrine, requiring that municipalities allow a fair share or provision of housing types (Rowan, 2007). The case law indicates that it is unlawful for municipalities to use exclusionary zoning ordinances to partially or totally block the construction of certain types of housing, specifically multifamily dwellings (*National Land & Investment Company. v. East town Twp. Board of Adjustment, Kohn*, 1965; *Girsh Appeal*, 1970; *Township of Willistown v. Chesterdale Farms, Inc.*, 1975; *Surrick v. Zoning Hearing...*
Board of Upper Providence Township, 1977; Fernley v. Bd. of Supervisors, 1985). The construction of multifamily dwellings in suburban districts sought to open the doors for certain low-income families from urban dwellings to move to desirable suburban districts.

**Early fair share doctrine: housing for “all categories of people”**. Initially, Pennsylvania promoted a framework recognizing the need to create housing for lower income populations in municipalities. The Pennsylvania Supreme Court held in National Land & Investment Company (1965) that the general welfare is not “fostered or promoted” by a zoning ordinance that is exclusionary (p. 611). A zoning ordinance that would prohibit the development of smaller, less expensive homes, such as apartments is exclusionary. The court stated, “It is not difficult to envision the tremendous hardship, as well as the chaotic conditions, which would result if all the townships in this area decided to deny to a growing population sites for residential development within the means of at least a significant segment of the people” (p. 610-613). The Pennsylvania Supreme Court was very explicit in its later opinions that suburban municipalities cannot keep out people who desired to move to the suburbs from the inner city. Most jobs that at one time were in the urban city centers are now in the suburbs. Municipalities “cannot close its doors to others seeking a ‘comfortable place to live’” (Girsh Appeal, 1970, p. 246; Township of Willistown v. Chesterdale Farms, Inc., 1975).

Utilizing New Jersey’s Mt. Laurel (1975) decision, the Pennsylvania Supreme Court expanded upon the scope of the fair share doctrine. The fair share doctrine requires local municipalities “to plan for and provide land use regulations which meet the
legitimate needs of all categories of people [emphasis added] who may desire to live within its boundaries” (Surrick v. Zoning Hearing Board, 1977, p. 189).

Changing fair share: protecting the “types of housing” not “classes of people”. By the 1990s, Pennsylvania cases began to limit the purpose and scope of the de facto fair share doctrine. In BAC, Inc. v. Board of Supervisors (1993), the lower court, persuaded by Mt. Laurel (N.J. 1975) and other Pennsylvania precedents such as Williston (1975), Surrick (1977), and Fernley (1985), found the challenging municipality’s zoning ordinance to be unconstitutional because it did not provide opportunities for housing for low-to moderate income families (p. 386). The Pennsylvania Supreme Court found this type of evidence, regarding the classes of people negatively impacted by the ordinance to have no value. Thus, the court pronounced a holding that the fair share doctrine and the other line of cases only requires the court to strike down ordinances that restricts certain uses of property, not classes of people (BAC, Inc. v. Board of Supervisors, 1993). This holding asserts a view that the protection of types of housing is more important than access to housing in the suburbs (See Precision Equities, Inc. v. Franklin Park Borough, 1994, and Heritage Building Group, Inc., v. Plumstead Township, 2003). New Jersey’s Mt. Laurel (1975) decision, articulating a more people oriented, affordable housing proposition in protecting against exclusionary zoning ordinances is not the law in Pennsylvania (Rowan, 2007).

This change in interpretation of the fair share doctrine from a protection of housing opportunities for different types of people to types of housing may be reflected in changes in federal and the Pennsylvania legislature waning commitment to eliminate vestiges of segregation. In the 1990s, the Supreme Court began to dismantle

The Pennsylvania courts perspective on property rights also changed. In *BAC, Inc.* (Pa. 1993), the Pennsylvania Supreme Court clarified that the previous line of fair share cases was based upon the constitutional right of property owners to own and enjoy property; therefore, the exclusion of classes of people was not relevant (p. 147; See Rowan, 2007, p. 1285). The Pennsylvania courts began to assert other social priorities than providing a fair share of housing such as environmental and farmland preservation and containing sprawl in Pennsylvania (Rowan, 2007). In *re Petition of Dolington Land Group* (2003), the court noted that developed land had increased even though population growth had not (p. 1028). The Pennsylvania Supreme Court held that these priorities could justify a municipality’s decision to restrict development based on density, type, and location of housing (Rowan, 2007, p. 1288; *Dolington*, 2003, p. 1032).

In Pennsylvania, the push to promote affordable housing policy runs against its need to protect the property rights and land use authority of individual fragmented municipalities as authorized in the MPC. For example, even though Pennsylvania passed an Affordable Housing Act in 1992, the law does not place any restrictions or affirmative duties on municipalities. The law establishes a Pennsylvania Housing Authority Committee merely to report on housing needs and policies throughout the Commonwealth (Rowan, 2007, p. 1280; *BAC, Inc.*, 1993).

Additionally, the current de facto fair share policy does not necessarily guarantee that the developers will build multifamily homes or guarantee that multifamily homes
will be affordable (Rowan, 2007; Span, 2001). Without a policy focusing on classes of people, requiring suburban municipalities to include affordable housing, low-income minority families are still blocked from entry, and therefore are also blocked from accessing school systems in suburban municipalities (Rowan, 2007). For example, in 1975 the Buckingham Township’s zoning ordinance unconstitutionally excluded multifamily housing and mobile homes. Buckingham Township is located in Bucks County, Pennsylvania within the Philadelphia metropolitan area. The court required that the developer and the Township\textsuperscript{17} negotiate. Instead of constructing affordable multifamily dwellings, there are single-family homes valued between $400,000 to $750,000, and a luxury mobile home park with home values of approximately $200,000 (Rowan, 2007, p. 1271-1272).

In conjunction with a fair share doctrine that does not protect classes of people. Pennsylvania does not currently have a law that bars housing discrimination against individuals using government subsidies to help pay for their rent (Kahlenberg, 2017). Only 14 states and sixty local jurisdictions have “source of income” anti-discrimination laws (Poverty and Race Research Action Council (PRRAC, 2017). In Pennsylvania only three local jurisdictions, State College Borough, Philadelphia, and Pittsburgh have such laws (PRRAC, 2017).

\textbf{Conclusion}

Pennsylvania has the policies to place a dent in providing equitable integrated communities through the PHRA’s addressing de facto segregation and the MPC’s de

\textsuperscript{17} Buckingham Township is one of the most affluent and least racially diverse municipalities in the metropolitan area. The White percentage is 92\%, median household income is $122,000, and 92.4\% of the homes are single-family units (ACS, 2015).
facto fair share doctrine. However, the legal and political trajectory of each law exemplifies the different ways that beneficial laws can be manipulated, transformed, and twisted to protect the educational boundaries and local property rights of municipalities, instead of providing for the educational and housing opportunities of different types of people. Understanding the Pennsylvania context, this dissertation now focuses on local policies and decisions to determine how housing and school policies contribute to racial and economic segregation and fragmentation between suburban school districts.
Chapter Five

Lower Merion Township and Narberth Borough Zoning and Housing Policies: The Development and Protection of Wealth Along the Main Line

Introduction

According to the Lower Merion Township 1937 comprehensive plan, the municipality described itself as “one of the most attractive suburban residential sections of the country… Its services, public and private, are well and efficiently managed. It is a good place to live in” (p. 8). “It is a good place to live in” has been the slogan of Lower Merion Township for the past 80 years (Lower Merion Township (LMT), 2016; 1979; 1962; 1937). Lower Merion Township’s 2016 comprehensive plan further lays out criteria proving that the Township is a great place to live in: It contains “safe, attractive residential neighborhoods; exceptional public schools; well-maintained roads and community infrastructure; convenient public transportation; high quality services; parks and libraries; and attractive, pedestrian-friendly locally oriented commercial districts—all of which are developed in harmony of the natural environment” (LMT, 2016, p. 1).

This high perception of its quality is not just lip service, specifically in regard to its school district. Lower Merion School District is regarded as the largest, most affluent, nationally ranked school district in Montgomery County (NCES, 2016; Niche, 2017; Business Insider, 2014; Openpagov.org; Montgomery County Planning Commission (MC), 2015d). Furthermore, Lower Merion Township is home to or adjacent to six private higher education institutions: Rosemont College, Villanova University, St. Joseph’s University, Harcum Junior College, Bryn Mawr College, Haverford College,
and Philadelphia College of Osteopathic Medicine (PCOM) (LMT, 2016). Despite or possibly due to its size, affluence, and accolades, Lower Merion School District and its encompassing municipalities, Lower Merion Township and Narberth Borough, fail to be economically and racially diverse in comparison to other inner-ring suburban communities.

According to the US Census, from 1960 until 2014, the municipalities and school district’s racial and economic percentages underwent very little demographic change. In 1960, Lower Merion’s non-White population was at 4.9%, with a 4.7% Black population (US Census, 1960). Narberth Borough’s Non-White population was practically non-existent at 0.1% (US Census, 1960). Fifty years later, with growth in the Asian (7.2%) and Hispanic (4.1%) populations, the non-White population in Lower Merion Township grew to 16.5%; however, the Black population only grew to 5.9%, a mere 1% increase from 1960 (ACS, 2010-2014). In Narberth Borough, the non-White percentage grew to 7.2%. Mirroring the demographic changes experienced in Lower Merion, the Black population in Narberth only grew by 1% (ACS, 2010-2014).

In terms of school district percentages, the Lower Merion School District proves to have a greater non-White student enrollment of 23%, than the municipality, specifically in regard to Asian and Hispanic populations. Yet again the Black student population stagnated between 1990 and 2014 at 8% (NCES, 2013-2014).

Economically, Lower Merion and Narberth represent the most affluent communities in Montgomery County and have some of the wealthiest zip codes in the country (ACS, 2010-2014; LMT, 2012; Schiffman, 2015; Mennen, 2014). Additionally,
Lower Merion Township is an employment center, boasting the second highest number of jobs in the County behind Upper Merion Township (LMT, 2016, p. 25).

Even though Lower Merion Township and Narberth Borough are located adjacent to a racially diverse Philadelphia area, these suburban communities have proven to be accommodating to wealthy White populations often at the exclusion of minority and moderate to low-income populations (Geller, 1970; Bishop, 1981ab; Williams, 1985; US Census 1960-2010). This has been evidenced throughout history, beginning with Lower Merion’s Welsh Quaker heritage in 1682, through the development of the Main Line Railroad in 1850, which settled suburban communities specifically for Philadelphia’s wealthiest White families (Geller, 1970; Lower Merion School District (LMSD), 1979). To the creation of the first zoning ordinance in the country in 1927 and the exponential population growth during the post-World War II period led to the development of commercial spaces, parks, schools, and diverse types of housing predominately for those who could afford to do so (LMT, 1937; 1962, 1979; 2016).

The exclusivity surrounding Lower Merion Township operates as a great barricade creating race and class segregation within and outside of its boundaries. This exclusivity requires a follow-up addition to Lower Merion’s slogan, “it is a good place to live in,” but for whom? The development and maintenance of Lower Merion Township and Narberth Borough as majority White, affluent suburban communities require inquiries into Lower Merion’s zoning, housing, and school policies.

**Findings Summary**

For the purpose of this chapter, I analyzed the zoning and housing policies of Lower Merion Township from 1937 until present day to assess how these policies
maintained such affluence and Whiteness over the past half-century. First, the analysis of Lower Merion’s zoning policy from 1937 until present day shows Lower Merion to be a historically well-planned jurisdiction that created and maintained geographic, economic, and cultural barriers excluding low-income and minority populations (LMT, 1937; 1954; 1962; 1979; 2016). In furtherance of this finding, the data elucidates Lower Merion’s zoning history to explore how the municipality created and maintained such barriers. Lower Merion’s Main Line identity, the location and development of residential and commercial properties, and the location of historical Black and low-income populations have all contributed to form difficult barriers for low-income and minority populations to access. Furthermore, the Philadelphia tracts surrounding Lower Merion are more affluent and have varying degrees of racial transition than most areas in Philadelphia, contributing to Lower Merion and Narberth’s economic and racial isolation.

Second, the housing policy analysis from 1937 until present day indicated that the high cost of housing in Lower Merion Township and Narberth Borough impedes access for low-to-moderate income and minority families (US Census, 1960-2010; ACS, 2010-2014; LMT, 2012). The cost of housing is the highest in Montgomery County (ACS, 2010-2014). Due to the high cost in housing, Lower Merion Township struggles to develop affordable housing opportunities for Township workers and families (LMT, 2016). Finally, even though multifamily housing options are vast, rental opportunities are decreasing in the Lower Merion neighborhoods located directly adjacent to Philadelphia (US Census 1960-2010; ACS, 2010-2014).

18 Chapter Six focuses on the school policies of Lower Merion School District.
An additional character in Lower Merion’s story is the role that Philadelphia plays in helping to protect the exclusivity, affluence, and Whiteness of this suburban enclave. An analysis of the relationship between municipality officials, school district leaders, and residents shows that the exclusion of minority and lower-income populations was not an accident, but perceived as an intended necessity to maintain its status as a high quality suburban community.

**Zoning Policy**

Lower Merion Township is a well-planned district that maintained boundaries excluding minority and low-income families from the district, while recruiting White, affluent populations to the jurisdiction. Furthermore, I also investigate the Township’s geographic and cultural position within the Philadelphia metropolitan region.

**Geographic Boundaries of Lower Merion Township and Narberth Borough**

Lower Merion Township is an inner ring suburb of West Philadelphia, serving 12 distinct census tracts: Bala, Cynwyd, Merion, Penn Wynne, Wynnewood, North Ardmore, East Ardmore, West Ardmore, Haverford, East Bryn Mawr, Rosemont, Gladwyne, North Penn Valley, South Penn Valley, and Belmont Hills (See Figure 5-1).

The Lower Merion Township is the most populated municipality in Montgomery County, boasting a population of 58,273 in 2014 (ACS, 2010-2014). Narberth Borough is a separate municipality of half a square mile embedded within Lower Merion Township (See Figure 5-1). Montgomery County municipalities of Conshohocken Borough, West Conshohocken, Upper Merion Township, and Whitemarsh Township are located on the western part of Lower Merion Township. Delaware County municipalities of Radnor
Township and Haverford Township are located to the south of Lower Merion Township (See Figure 3-2 in Chapter Three).

The Township is bounded by Philadelphia on two sides. City Avenue or U.S. Route 1 is part of a five-lane highway on the eastern side of the Township, dividing Lower Merion and the Philadelphia neighborhoods of Overbrook Park, Wynnefield, and Overbrook. To the north, the Schuylkill River completely divides Lower Merion Township and the Philadelphia neighborhoods of Roxborough, Manayunk, and East Falls.

**Figure 5-1:** Lower Merion Township and Narberth Borough map and census tracts

Source: US Census, 2000
Note: The blue line at the top of Lower Merion is the Schuylkill River. The dotted white line in the east is City Avenue. The thin white line at the south or bottom of Lower Merion is the Delaware County boundary.

These suburban and urban municipality connections have been integral to the cultural and economic development of Lower Merion Township, Narberth Borough, and its school district (LMT, 2016). Lower Merion’s geographic position as the gateway to
the western suburbs and to the Main Line allowed planners to enact formidable boundaries to protect the Main Line culture that represented wealth and [W]hiteness (Geller, 1970). The Philadelphia tracts surrounding Lower Merion also isolates the municipality from incurring demographic shifts.

**Zoning Policy Protected the Wealth of the Main Line**

After the Supreme Court case, *Euclid v. Ambler* (1926), which validated zoning as a municipal power, Lower Merion Township became the first municipality in the country to create a zoning ordinance that would govern its suburban growth and land use development (LMT, 2016). At an early period, Lower Merion Township focused on zoning policy that would maintain its wealth and influence through the use of commercial spaces, the choice to limit high density property in the west and low-income and minority populations on the Delaware County boundary line out of sight from Philadelphia.

**The development of wealth.** A 1979 LMSD document argued that the earlier colonial and Quaker influence set forth the original traits of “local conservatism, independence, culture, and wealth” (p. 1). Such wealth was solidified when Lower Merion Township became a desirable destination for the wealthy due to the construction of the Pennsylvania Railroad (The Main Line) in the mid-19th Century (LMT, 1937; Jones, 2000). The Main Line is a 20-25-mile area opening to the western suburbs (mainlinehomes.com, n.d; Figure 5-2). Working class populations such as Blacks, Irish, and Italians also came to Lower Merion to serve as domestic employees to the wealthy populations and to work in industries such as the Pecoyd Iron Works along the Schuylkill River and the Autocar Factory in Ardmore (LMT, 2016; 1937).
But the cultural narrative of the Main Line solidified Lower Merion and other western suburbs as the destination for Philadelphia’s most affluent and influential families, representing supporters of the arts, banking, politics, media, and business (Geller, 1970). Geller (1970) describes the Main Line as “the densest concentration of the ‘upper class’ in America”, where Lower Merion Township serves as the gateway. Additionally, Lower Merion, Narberth, and other Main Line communities’ racial makeup has been almost exclusively White for generations. Geller (1970) argues that the creation and maintenance of such makeup was purposeful: “… [T]here’s no indication that the makeup of the area is changing. When the 19th century industrialists began building their estates, the Main Line meant wealth and [W]hites.”

**Figure 5-2**: Map of the Main Line municipalities

Source: SAGE Realty LLC
The municipality recognized the need to plan for growth by explicitly defining neighborhoods, alleviating traffic, providing and limiting housing opportunities, preserving open spaces, and creating economic, geographic, and cultural buffer zones that would maintain the wealth of Lower Merion and confine their lower-income, minority populations (LMT, 1937).

**The protection of wealth.** Major zoning policies from 1937 to 2016 helped to solidify the boundaries for White and affluent populations.

**Developing commercial spaces.** Lower Merion allowed for the development of high-end commercial centers that alleviated residents’ financial burden in real estate taxes. According to the 2016 comprehensive plan, commercial real estate taxes amounted to 11% of the total real estate tax revenue in Lower Merion (p. 243). These commercial spaces produced tax revenues greater than the cost required to pay for the high-end services in the community such as parks, libraries, and schools (Cook, 1985).

Suburban Square, developed in 1926 in Ardmore, was the first shopping center in the County to draw in a major department store, Strawbridge & Clothier, to the suburbs (Vigoda, 1991; Jones, 2000). Lower Merion Township became more traversable due to the construction of the Schuylkill Expressway between 1949 and 1959 (LMT, 1954; Bauman, 2015). Lower Merion and Philadelphia also widened City Avenue from a two-lane roadway to four lanes (Seeyle, 1985). Such transportation changes helped to further develop City Avenue, the boundary between Lower Merion and Philadelphia, as a commercial center (Vigoda, 1992). This road connects to downtown Philadelphia, the Schuylkill Expressway, Pennsylvania Turnpike, and Roosevelt Boulevard (Seelye, 1985).
In the 1950s and 60s, development of high-end shopping centers, businesses, hotels, and higher education institutions on both sides of City Avenue gave the street its nickname “The Golden Mile” (Seeyle, 1985; Kerkstra, 2000; LMT, 2016). WCAU (Channel 10, NBC) settled along City Ave in 1950, after the Bala Shopping Center and Lord and Taylor department store in 1955, the Marriott in 1962, and Saks Fifth Avenue in 1969 (Seeyle, 1985; Vigoda, 1992). Today, City Avenue is the second densest office market in the Philadelphia region and is home to 130 shops and restaurants, two private higher education institutions—Philadelphia College of Osteopathic Medicine (PCOM) and St. Joseph’s University, six neighborhoods covering two counties, historical landmarks, parks (Fairmount Park), and trails (Welcome to City Ave, n.d.).

City Avenue also serves as an effective commercial and physical buffer between Lower Merion Township and western Philadelphia residential neighborhoods. This point will be discussed in detail when I discuss the Township’s relationship with Philadelphia and adjacent Philadelphia neighborhoods.

**Residential development and density.** Lower Merion Township heavily developed the eastern half of the Township and excluded high-density development in the west, which in turn aided in preserving the high value of land (LMT, 1937; 1954; 1962; 1979; 2016). The western neighborhoods of Gladwyne and Rosemont are spaces with large size properties and sprawling plots of land valued over a million dollars, and considered some of the wealthiest zip codes in the nation (See Figure 1; ACS, 2010-2014; Mennen, 2014).

In the 1979 comprehensive plan the municipality noted that low-density residential development situated on the western side of the municipality was due to
environmental factors such as lack of sewerage facilities and soil development problems. Such environmental factors precluded large high-density housing such as multifamily homes (LMT, 1979). Conversely, such environmental factors do not exist in the east, where the flat land permitted high-density development. Housing developments in the eastern part of the township have smaller lot sizes and some tracts reflect a housing pattern similar to Philadelphia (LMT, 1979).

Yet, contrary to what the 1979 comprehensive plan implied, a former Lower Merion planner in a Philadelphia Inquirer article attributed low-density housing in the west not to environmental factors but to the foresight of 1927 planners to enact stringent planning and zoning measures (Cook, 1985). As estates are gradually broken up for housing or institutions, the new developments will become sources of further tax revenues for the Township (Cook, 1985). In most older inner ring suburban communities, the space is fully developed therefore limiting the land available for homeowners and future growth (Hanlon, 2010). By leaving room to develop, Lower Merion Township made the land more valuable.

**Racial and economic exclusivity.** The wealth and zoning policies of the Main Line has hidden and confined its historical minority and lower income, working class populations along the Delaware County line in the neighborhoods of Ardmore and Bryn Mawr (See Table 1; See Figure 1; MC, 2015c). For example, the overall wealth of Lower Merion, with a MHI of $115,657 and poverty rate of 4.9%, overwhelms West Ardmore’s $44,722 MHI, poverty rate of 19.9%, and a 33% Black population (Table 1).

In 1900, about 1,000 Blacks migrated to the Main Line from the South in search of work (Williams, 1985). They became domestic employees to the wealthy families and
worked in the Autocar Corporation in Ardmore; therefore, Black families settled in Ardmore and continued to thrive for generations (Williams, 1985; Vigoda, 1991; Gordon, 1988). Black businesses existed in Ardmore and Bryn Mawr, catering primarily to Whites “because they were the only people on the Main Line who had money” (Seelye, 1986). The 1937 comprehensive plan\(^\text{19}\) noted that the Black population concentrated in Ardmore, and recognized the need to build low-income housing to confine substandard housing, and therefore such populations, in Ardmore, Bryn Mawr, and West Manayunk (Belmont Hills) (LMT, 1937; See Table 5-1). “The black community was a separate society, a ‘community within a community’. … It still exists” (McMillan, 1983).

\(^{19}\) The 1937 comprehensive plan is the only plan that discusses the Black population in Lower Merion. The 1954, 1962, 1979, and 2016 comprehensive plans do not discuss race.
<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
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<td>W. Ardmore</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black %</td>
<td>35%</td>
<td>42%</td>
<td>47.6%</td>
<td>41.5%</td>
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<td>33.1%</td>
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<td>7.9%</td>
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<td>10.9%</td>
<td>20.8%</td>
<td>19.9%</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black %</td>
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<td>17%</td>
<td>16.7%</td>
<td>13.9%</td>
</tr>
<tr>
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<td>7.9%</td>
<td>4.1%</td>
<td>4.1%</td>
<td>9.3%</td>
</tr>
<tr>
<td>W. Bryn Mawr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black %</td>
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<td>13.8%</td>
<td>11.9%</td>
<td>11.7%</td>
<td>13.3%</td>
<td>10.6%</td>
<td>12.1%</td>
</tr>
<tr>
<td>MHI</td>
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<td>N/A</td>
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<td>$41,574</td>
<td>$56,250</td>
<td>$63,542</td>
<td>$73,500</td>
</tr>
<tr>
<td>Poverty %</td>
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<td>N/A</td>
<td>7.2%</td>
<td>5.3%</td>
<td>19.7%</td>
<td>19.3%</td>
<td>11.3%</td>
</tr>
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</tr>
<tr>
<td>Black %</td>
<td>3.4%</td>
<td>2.4%</td>
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<td>5.5%</td>
<td>7.3%</td>
<td>2.8%</td>
<td>6%</td>
</tr>
<tr>
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<td>N/A</td>
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<td>$37,533</td>
<td>$52,174</td>
<td>$58,526</td>
<td>$97,7560</td>
</tr>
<tr>
<td>Poverty %</td>
<td>N/A</td>
<td>N/A</td>
<td>13.4%</td>
<td>16.1%</td>
<td>15.4%</td>
<td>14%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Bala (City Ave)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black %</td>
<td>0.5%</td>
<td>0.4%</td>
<td>1.2%</td>
<td>3.2%</td>
<td>4%</td>
<td>13.7%</td>
<td>8.3%</td>
</tr>
<tr>
<td>MHI</td>
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<td>N/A</td>
<td>$25,833</td>
<td>$61,772</td>
<td>$56,250</td>
<td>$63,542</td>
<td>$73,500</td>
</tr>
<tr>
<td>Poverty %</td>
<td>N/A</td>
<td>N/A</td>
<td>6.3%</td>
<td>2.9%</td>
<td>3.6%</td>
<td>10.9%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Lower Merion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black %</td>
<td>4.7%</td>
<td>3.9%</td>
<td>4.7%</td>
<td>4.5%</td>
<td>4.5%</td>
<td>5.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>MHI</td>
<td>N/A</td>
<td>N/A</td>
<td>$30,006</td>
<td>$63,197</td>
<td>$86,373</td>
<td>$111,165</td>
<td>$115,657</td>
</tr>
<tr>
<td>Poverty %</td>
<td>N/A</td>
<td>N/A</td>
<td>4.8%</td>
<td>3.9%</td>
<td>4.5%</td>
<td>5.4%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>


Racial segregation proved not to be the only issue of discrimination in the Main Line. Histories of other suburban communities include instances of anti-Semitism (Flashback, 1999). Protestant Main Line families had unwritten covenants forbidding the sale of their homes to Jews. Geller (1970) signified that the Jews were able to meet the price for the Main Line homes, but they were not considered “acceptable families” (p. 14). However, many families, in spite of religious differences inculcated themselves along the Main Line if they could afford to do so.
Despite the appearance of overwhelming wealth, poverty does exist in the Main Line but the poor “exist in the shadows” and are “hidden behind shabby exteriors in nice neighborhoods, rather than scarred, forbidding neighborhoods of Philadelphia” (McMillan, 1983). A former Township community services director noted “People move out here to escape the cities . . . Poverty threatens their view of where they’re living” (McMillan, 1983).

The geographic location of minority and lower-income communities may play an integral role in determining if there are access points for lower-income, minority populations from Philadelphia. Through the use of unwritten exclusionary housing policies, before and after the first 1927 zoning code, confinement of affordable housing was in Ardmore, and the preference of affordable housing for populations already living in these spaces20 (LMT, 1937; MC, 2015; Lower Merion Housing Association Corporation (Lower Merion Affordable Housing Corporation (LMAHC), 2006). Black and low-income populations’ percentages are kept low and are confined in Ardmore and Bryn Mawr hidden from the Philadelphia boundary lines (LMT, 2012). Even if one could afford access, the perpetuation and perception of affluence and Whiteness that maintains segregated communities along the Main Line may serve as a sign that minority families need not apply.

Culture of exclusivity. Lower Merion’s affluent, prestigious Main Line history cultivates a culture of exclusion. Real-estate agents interviewed for a 1985 Philadelphia Inquirer article indicated that they steer the most affluent families “seeking more sophisticated lifestyles to Lower Merion Township, Devon in Tredyffrin Township and Wayne in Radnor Township” (Cook, 1985). Additionally, such affluent families have

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20 This point will be discussed later in the Housing section of this Chapter.
lived on the Main Line for generations (Vigoda, 1991; Warner, 1987; Mastrull, 2005). Vigoda (1991) reiterates,

[T]he Main Line is an area not of great ebb and flow, but of blips…. This is not really a mobile area. It’s very traditional, not transient at all. People don’t change. Their grandparents grew up here, their parents have grown up there, they’ve gone to school here and they stay here. (p. M04)

Tracing one’s family generational development along the Main Line is a sign of pride and acceptance. Even though the space no longer holds onto the antiquated class consciousness of the old guard, where it took three generations living on the Main Line to be accepted, residents fight zoning policies that would diminish Lower Merion’s depiction of a quality suburb (Mastrull, 2005).

The article that best exemplifies the exclusionary mentality of the Main Line was the 1981 Philadelphia Inquirer article about subdivision dispute in Gladwyne. Gladwyne is home to sprawling mansions and millionaires that have been in the community for generations (Fineman, 1981). Gladwyne neighbors were upset over Black RnB singer, Teddy Pendergrass’ intent to subdivide his 13-acre property (Fineman, 1981). Gladwyne neighbors argued that subdivisions would cause more people to live in the community, therefore increasing traffic and diminishing privacy: “We all like things just the way they are around here. And whoever tries to change it will be closely scrutinized” (Fineman, 1981). Another neighbor stated, “Indeed, it is a tribute to this man [Teddy Pendergrass] that he can raise himself out of the ghetto to afford this magnificent place… We’re just concerned about this magnificent place now becoming a ghetto” (Fineman, 1981, p. A01). This language laced in classism, attaching the threat of subdivisions and housing changes by a Black neighbor with the deterioration of the status quo in Gladwyne. Teddy Pendergrass was the only Black homeowner living in Gladwyne at the time. According
to the 2014 American Community Survey, Gladwyne’s Black percentage stands at 1.1% and Gladwyne has the least density of all the tracts in Lower Merion (LMT, 2016). Thus, not much has changed since 1981.

Furthermore, questions of exclusivity pertain to the geographic relationship between Lower Merion Township and Narberth Borough. In 1987, Narberth Borough and Lower Merion Township established an agreement to notify the planning department of the other jurisdiction regarding building or zoning proposals about development across the line (Warner, 1987e). Pennsylvania law does not require municipalities to provide any notification mechanism for joint planning (Warner, 1987e; MPC, 1968). The data shows zoning disputes between these two municipalities (Kerkstra, 2000). In 2005, Narberth Borough, citing concerns over traffic, had filed a lawsuit to stop the development of a 250-unit apartment complex in Wynnewood (Mastrull, 2005).

Past and present fights over the construction of two new high schools, parking lots, commercial projects, sidewalks, location of bus fleets, and low-income housing have been met with extreme resistance by residents to protect the property values and community standards of the Main Line (Mastrull, 2005; Warner, 1987ce). Lower Merion’s municipal government recognizes that they are not plagued by problems faced by other older inner ring suburban communities, such as loss of population, rising crime, financial issues, and failing schools. But acknowledged that if they fail to improve their zoning policies they would face similar issues in time (Mastrull, 2005). Therefore, zoning policy is not just a tool used by the municipalities to develop or control their residential, commercial, and institutional spaces; zoning policy also represents the cultural and historical narrative of a jurisdiction. In Lower Merion it serves to protect the
wealth and exclusivity of the space, and the municipality government must answer to residents who chose Lower Merion because of those characteristics.

**Philadelphia Tracts Isolates Lower Merion from Demographic Shifts**

In the 1962 comprehensive plan, Lower Merion Township planners noted, “the Township is not an island. Lower Merion’s position in Metropolitan Philadelphia is a dominant fact in its development, it could not exist in the present form independent of the larger community” (p. 6). This is partially true; in spite of the planner’s insistence that Lower Merion is not an island, its racial and economic demographics have served as an island of whiteness and affluence, juxtaposed to a growing Black, poorer urban city (See Table 5-2). However, Lower Merion Township and Narberth’s location adjacent to West Philadelphia have caused the planners to work with Philadelphia to acknowledge the issues and demographics of the populations that exist across the street to adequately prepare cultural and economic buffers between municipalities.

**Demographic divisions between Lower Merion, Narberth, and Philadelphia.**

Table 5-2 shows that each decade since 1980, the margin between Lower Merion and Narberth’s median household income and Philadelphia’s has increased, indicating that the economic segregation gap between these spaces is widening. While the suburban municipalities’ poverty rates have stagnated at 4-5%, Philadelphia’s poverty rate grown has from 20% to 27%.
According to Table 5-3, racial changes in Lower Merion can only be seen recently between 2000 and 2010, while Philadelphia has undergone a complete transformation every decade from a majority White population in 1960 to a majority minority population in 2014. Such extreme racial changes in Philadelphia could be attributed to extreme White flight to the suburbs and the growth of a Black population from 26% in 1960 to 43% in 2014 (Orfield, 2001; 2009; See Milliken, 1974).
Despite the racial and economic segregation existing between Lower Merion Township and Philadelphia, adjacent Philadelphia neighborhoods along the Schuylkill River and City Avenue have not gone through substantial demographic transitions within the last 50 years that impacted most Philadelphia neighborhoods (See Figure 5-3, 5-4). Furthermore, Philadelphia heavily developed these adjacent Philadelphia communities to be economically vital residential and commercial spaces, therefore creating a double buffer zone for Lower Merion to be protected from significant racial and economic transitions beyond the Township’s own efforts. It is critical to recognize that the Lower Merion neighborhoods along Philadelphia, City Avenue (Penn Wynne, Merion, Bala) and the Schuylkill River (Gladwyne, North Penn Valley, Belmont Hills, and Cynwyd), except for Bala, are approximately 80-90% White (See Figure 5-3), and have a MHI above $100,000 (See Figure 4; See Housing Section).
Schuylkill River tracts. The Philadelphia neighborhoods along the Schuylkill River are Roxborough, Manayunk, and East Falls (See Figure 5-3). According to Figure 4, these neighborhoods have stayed overwhelmingly White since the 1960s, on par with Lower Merion and Narberth. Out of the 16 tracts that make up the Schuylkill River Philadelphia neighborhoods, all but one\(^{21}\) has a White percentage of 77-91%. Even though a significant income gap exists between Lower Merion Township and the Schuylkill River Philadelphia neighborhoods, most of these tracts have a greater MHI than Philadelphia (ACS, 2010-2014). The most affluent tracts are in the Andorra neighborhood in Roxborough, Philadelphia boasting a MHI of $76,964 (US Census, 2010).

Philadelphia has developed these communities for quality residential and commercial purposes taking full advantage of the Schuylkill River (See Romero, 2017). For example, since the late 1980s, Manayunk has developed into a “trendy” hot spot for restaurants, bars, shops, residential apartment complexes and single-family homes, which populations can enjoy along the Schuylkill River (Warner, 1988; Manayunk, n.d.).

City Avenue tracts. To the east of Lower Merion Township is City Ave or “The Golden Mile” (Kerkstra, 1999). City Ave has been an important and heavily trafficked transportation and commercial nexus since the 1950s (Seelye, 1985). Behind City Ave, on the West Philadelphia side are ranges of low-income, middle, and upper-class communities. Unlike the Schuylkill River Philadelphia neighborhoods, Overbrook Park and Wynnewfield along City Ave have gone through racial and economic transition since the 1970s (See Figure 5-3, 5-4).

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\(^{21}\) Tract 206 in East Falls has a White percentage of 55%.
Specifically, the Wynnefield neighborhood is a “classic example of [W]hite flight” (Mezzacappa, 1986). Wynnefield was once recognized as one of the most sought after residential areas in the city but have experienced decline and blight since the 1970s (Mezzacappa, 1986). The Jewish community fought racial blockbusting in the 1960s. The neighborhood has experienced substandard services such as police services (Mezzacappa, 1986). One resident observed, “I think that when a neighborhood becomes progressively [B]lacker, there’s deterioration of city services… In predominately White neighborhoods, there is a different attitude in law enforcement” (Mezzacappa, 1986).

City Ave is not just a demarcation line between two municipalities, but of class and race. Concerns about crime along City Ave can be attributed to such high commercial traffic and extreme wealth disparities between racially transforming spaces in Philadelphia (Nolan, 1997). However, the racial and economic changes across City Avenue did not have any significant impact on the racial and economic demographics in Lower Merion (See Figure 5-3, 5-4). Lower Merion and Philadelphia have developed a regional planning partnership along City Ave to combat crime, coordinate traffic, beautify the space, and to plan for new development (Kerkstra, 1999). Due to shared cooperative services by Lower Merion and Philadelphia, City Ave does not just divide suburban and urban municipalities; City Avenue serves as a commercial blockade buffering Lower Merion Township residential communities from West Philadelphia residential communities. To access Lower Merion’s neighborhoods from Philadelphia requires one to go through high-end commercial spaces in Philadelphia, cross a heavily trafficked City Ave, then go through another set of high-end commercial spaces in Lower
Merion. Philadelphia is complicit in the racial and economic segregation between municipalities.

Furthermore, the Township’s desire to revise its zoning policy to limit large box stores in regional service areas or spaces that serve different municipalities, like Philadelphia can also serve as an impediment for lower income, minority populations to access Lower Merion (LMT, 2016). Big-box stores are large retail chains or superstores (BusinessDictionary.com).
Figure 5-3: Lower Merion Township and Narberth surrounding Philadelphia census tracts median household income

1980

1990

2000

2010

2010

Key

Source: Social Explorer

Note: The thin white line divides Montgomery County from Philadelphia County. The thick white line reflects Lower Merion Township’s borders.
Figure 5-4: Lower Merion Township and Narberth surrounding Philadelphia census tracts White percentage

Source: Social Explorer
Note: The thin white line divides Montgomery County from Philadelphia County. The thick white line reflects Lower Merion Township’s borders.
The zoning policy in Lower Merion Township and even in Philadelphia protects and preserves the wealth and the overall whiteness of the Main Line. Since 1927, Lower Merion has set zoning policies that preserved the Main Line culture, developed commercial spaces that served as a revenue stream and an internal buffer from the Philadelphia space, preserved the high land values by zoning for low-density housing in the western half of the Township, and segregated and confined the historical low-income, Black community. Furthermore, Lower Merion Township’s relationship with Philadelphia to develop the commercial property along City Avenue and the residential neighborhoods along Schuylkill River served as an external buffer to maintain Lower Merion Township’s economic and racial isolation.

**Housing Policy**

The zoning policy specifically in Lower Merion sought to protect the exclusivity of the Main Line by enacting commercial and residential policies that served to produce wealth as well as confine low-to-middle income, minority populations in spaces out of sight of the Philadelphia boundaries. This section further explores Lower Merion’s
housing types, cost, and policy. The data specified that the extraordinary cost of housing and limited renter and affordable housing opportunities make it difficult for low-to-moderate income families to access the district.

**Lower Merion and Narberth’s Housing Cost is the Highest in Montgomery County**

Economically, Lower Merion and Narberth are significantly affluent, demonstrated by their high median household incomes (MHI) of $115,657 and $88,090 respectively; poverty rates less than 5% in both municipalities; and school district’s Free and Reduced Priced Lunch (FRPL) at 8% participation (ACS, 2010-2014; NCES 2013-2014). According to the 2010 U.S. Census, Lower Merion has the 5th highest per capita income and 12th highest Median Household Income in the country with a population of 50,000 or more (LMT, 2012). With such wealth, it makes sense that housing cost would be exorbitant. For example, in 2016, 429 active listings and 135 pending sales existed for three million dollar and four million dollar homes. The best sellers are properties ranging in cost between $500,000 and $750,000 in 2016 (Heavens, 2016).

In 2014, Lower Merion’s median housing cost was $546,600. Even though Narberth Borough is less expensive, its median housing cost is $400,900. Demonstrated in Table 5-4, both Narberth and Lower Merion’s housing costs are higher than Montgomery County, and several times higher than that of neighboring Philadelphia County.

Conversely, existing wealth disparities are apparent looking closely to the neighborhood tracts differing housing and rental costs. Table 5-4 shows the range of median housing costs from the most expensive in Gladwyne, $904,400, to the least expensive in West Ardmore, $236,300. This $236,000 could afford a large home in other
Montgomery County or Delaware County municipalities, but in Lower Merion, this cost would only be enough to purchase a substantially smaller condo, apartment or one-bedroom home (Lower Merion Township Real Estate, 2017). In one Philadelphia Inquirer article, a real estate agent noted, “if families wanted a bigger house for a cheap dollar, go to Jersey or Haverford [Township]… if they want the finer things in life, go to the Main Line” (Cook, 1985).
Table 5-4: Lower Merion and Narberth tract demographics in order of MHI (2014)

<table>
<thead>
<tr>
<th>Census Tract</th>
<th>MHI</th>
<th>Housing Cost</th>
<th>Rental Cost</th>
<th>Rental %</th>
<th>Poverty Rate</th>
<th>Non-White %</th>
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<tbody>
<tr>
<td>Gladwyne</td>
<td>$204,297</td>
<td>$904,400</td>
<td>$1,454</td>
<td>13.4%</td>
<td>3.5%</td>
<td>13.2%</td>
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<tr>
<td>S. Penn Valley</td>
<td>$177,083</td>
<td>$641,500</td>
<td>$1,727</td>
<td>3.9%</td>
<td>2.9%</td>
<td>11%</td>
</tr>
<tr>
<td>Merion</td>
<td>$170,500</td>
<td>$569,000</td>
<td>$1,758</td>
<td>19.3%</td>
<td>2.6%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Rosemont</td>
<td>$162,243</td>
<td>$849,300</td>
<td>$2,001</td>
<td>7.4%</td>
<td>2.3%</td>
<td>9.6%</td>
</tr>
<tr>
<td>Wynnewood</td>
<td>$161,579</td>
<td>$514,000</td>
<td>$1,889</td>
<td>5.5%</td>
<td>1.3%</td>
<td>17.8%</td>
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<td>Cynwyd</td>
<td>$124,412</td>
<td>$620,400</td>
<td>$1,340</td>
<td>25.7%</td>
<td>3.6%</td>
<td>11.9%</td>
</tr>
<tr>
<td>N. Penn Valley</td>
<td>$119,022</td>
<td>$271,500</td>
<td>$1,569</td>
<td>10.6%</td>
<td>3.4%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Lower Merion Township</td>
<td>$115,657</td>
<td>$546,600</td>
<td>$1,366(^2)</td>
<td>23.6%</td>
<td>4.9%</td>
<td>16.5%</td>
</tr>
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<td>$1,135</td>
<td>25.4%</td>
<td>6.7%</td>
<td>8.3%</td>
</tr>
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<td>Belmont Hills</td>
<td>$109,808</td>
<td>$415,300</td>
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<td>13.8%</td>
<td>3.4%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Penn Wynne</td>
<td>$102,545</td>
<td>$344,700</td>
<td>$1,592</td>
<td>8.5%</td>
<td>3.7%</td>
<td>25.4%</td>
</tr>
<tr>
<td>E. Bryn Mawr</td>
<td>$97,750</td>
<td>$783,200</td>
<td>$1,635</td>
<td>59%</td>
<td>12.9%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Narberth</td>
<td>$88,090</td>
<td>$400,900</td>
<td>$1,121</td>
<td>39.8%</td>
<td>4.1%</td>
<td>7.5%</td>
</tr>
<tr>
<td>N. Ardmore</td>
<td>$84,719</td>
<td>$615,000</td>
<td>$1,366</td>
<td>45.7%</td>
<td>4.8%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Bala</td>
<td>$79,741</td>
<td>$378,100</td>
<td>$1,480</td>
<td>16.8%</td>
<td>4.1%</td>
<td>17.2%</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>$79,926</td>
<td>$290,000</td>
<td>$1,146</td>
<td>27.4%</td>
<td>6.4%</td>
<td>18.9%</td>
</tr>
<tr>
<td>W. Bryn Mawr</td>
<td>$73,500</td>
<td>$458,300</td>
<td>$1,315</td>
<td>43.8%</td>
<td>11.3%</td>
<td>27%</td>
</tr>
<tr>
<td>E. Ardmore</td>
<td>$61,218</td>
<td>$272,800</td>
<td>$1,275</td>
<td>44.2%</td>
<td>9.3%</td>
<td>22%</td>
</tr>
<tr>
<td>W. Ardmore</td>
<td>$44,722</td>
<td>$236,300</td>
<td>$1,109</td>
<td>67.7%</td>
<td>19.9%</td>
<td>42.5%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>$37,460</td>
<td>$145,300</td>
<td>$922</td>
<td>47.1%</td>
<td>26.7%</td>
<td>58.4%</td>
</tr>
</tbody>
</table>

Source: ACS, 2010-2014

Note: The table was color coded to understand the income, housing, and racial dynamics of the tracts. The green tracts represent the most affluent tracts in the Township, ranging from $119,022 to $204,297, above LMT’s MHI. The next six tracts coded orange have MHI’s in range of LMT, Narberth, and Montgomery County’s MHI. The bottom three tracts coded red have a MHI lower than the Montgomery County MHI and above Philadelphia’s MHI.

The rent is also high in Lower Merion. Out of the 17 tracts/ neighborhoods between Lower Merion Township and Narberth, all but three had a median gross rent higher than Montgomery County’s and all of the median gross rent is higher than Philadelphia’s (Table 5-4). The rent in Lower Merion can be a burden. According to

\(^2\) Lower Merion median rental cost for a 2-bedroom apartment was $1,075.00 (LMT, 2012, p. 30).
Lower Merion’s 2012 Analysis of Impediments to Fair Housing, 2,301 renters in Lower Merion were paying beyond 30% of their income for rent (cost burdened) between 2005 and 2009. About 28% of cost burdened renters were over the age of 65 and 45.55% of cost burdened renters made less than $20,000 (LMT, 2012, p. 30). For cost burdened renters it is more difficult to meet monthly expenses, to maintain their home, to save for a down payment for a home, and more difficult to qualify for a mortgage to purchase home, especially in the light of rising prices of housing and the tight housing market” in Lower Merion. (LMT, 2012, p. 30).

In 2010, Lower Merion had roughly 17.8% of households in need of low-to-moderate income housing (LMT, 2012, p. 9). This percentage does not include populations living on the outskirts of the boundaries wanting to access Lower Merion Township, but cannot afford to do so.

**Multifamily Housing Options are Significant but Rental Opportunities are Decreasing**

The typology of housing also contributes to the types of people living in the community (Bischoff, 2008). Multifamily opportunities (two or more units) in suburban spaces can serve a myriad of purposes, such as providing smaller dwellings for populations at different stages in life not ready or unable to buy a single-family home or for those wishing to downsize (Mangin, 2014). Furthermore, multifamily dwellings allow greater access for low-income and minority families to access suburban school districts (See Mangin, 2014).

Lower Merion and Narberth are predominately single-family residential spaces but boast a range of housing types, including significant multifamily options. Even though Narberth is small in size, it is a highly dense municipality with most of its
multifamily complexes built prior to 1939 (US Census, 1980; Table 5-5). About one third of housing in Lower Merion are multifamily complexes located predominately in the eastern side and along the boundary corridors of Delaware County, City Ave, and the Schuylkill River (ACS, 2010-2014). Like Narberth, Lower Merion’s Delaware County neighborhoods already established multifamily housing units prior to 1939 (US Census, 1980). However, most of the multifamily complexes in Lower Merion were built during the population boom in the 1960s along City Ave and the Schuylkill River. During this period, multifamily units increased from 22% in 1960 to 32% by 1970 (US Census, 1960, 1970).

**Table 5-5**: Lower Merion Township and Narberth Borough housing units (1960 to 2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>Municipality</th>
<th>Single Family Detached/Attached</th>
<th>2-9 Units</th>
<th>10 or more Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>LMT</td>
<td>78.2%</td>
<td>7.7%</td>
<td>15.1%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>68.8%</td>
<td>21.2%</td>
<td>10.1%</td>
</tr>
<tr>
<td>1970</td>
<td>LMT</td>
<td>68.4%</td>
<td>6.2%</td>
<td>25.8%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>62.9%</td>
<td>19.8%</td>
<td>17.3%</td>
</tr>
<tr>
<td>1980</td>
<td>LMT</td>
<td>67.1%</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>59.9%</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>LMT</td>
<td>68.7%</td>
<td>6.7%</td>
<td>23.55%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>55.8%</td>
<td>21.5%</td>
<td>20.4%</td>
</tr>
<tr>
<td>2000</td>
<td>LMT</td>
<td>69.8%</td>
<td>7.3%</td>
<td>22.9%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>63.45%</td>
<td>22.8%</td>
<td>13%</td>
</tr>
<tr>
<td>2010</td>
<td>LMT</td>
<td>68.6%</td>
<td>8.1%</td>
<td>23.2%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>64.5%</td>
<td>17.4%</td>
<td>13%</td>
</tr>
<tr>
<td>2014</td>
<td>LMT</td>
<td>68.9%</td>
<td>9.3%</td>
<td>21.7%</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>61.7%</td>
<td>25.4%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: U.S. Census 1960-2010; ACS, 2010-2014

However, despite the multiple opportunities for multifamily housing in Lower Merion, its renter percentage has declined. While in Narberth, the renter occupied percentage since 1970 has stayed at 40% over decades; Lower Merion’s rental percentage has declined from its height of 35% in 1970 to 23% in 2014 (See Table 5-6). These
percentage declines are even more significant along the Philadelphia boundaries in tracts with high multifamily housing such as in Bala, Cynwyd, Penn Wynne, North Ardmore, North Penn and North Penn Valley (ACS 2010-2014). Some of these tracts had renter percentages in the 1970s and 80s as high as 64%, but declined as low as 10.6% by 2014 (US Census, 1970, 1980; ACS, 2010-2014).

As discussed earlier, rent in Lower Merion Township is one of the most expensive in Montgomery County, however rental opportunities allow populations to access a neighborhood without the economic burden of homeownership. In a wealthy suburb like Lower Merion, declining renter opportunities and a dearth of affordable renter opportunities limits the openings for those who cannot afford to buy a home, therefore limiting their children’s access to its schools (Sanchez, Ross, Gordon, Edelman, Zonta, & Schwartz, 2015).

Table 5-6: Lower Merion and Narberth Borough housing occupancy and tenure (1960 to 2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>Municipality</th>
<th>Housing Units</th>
<th>Occupation %</th>
<th>Owner Occupied %</th>
<th>Renter Occupied %</th>
<th>Housing Value</th>
<th>Median Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>LMT</td>
<td>18,164</td>
<td>96.5%</td>
<td>72.3%</td>
<td>27.7%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>1,773</td>
<td>97.9%</td>
<td>64.5%</td>
<td>35.5%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1970</td>
<td>LMT</td>
<td>21,264</td>
<td>97.5%</td>
<td>64.8%</td>
<td>35.2%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>1,926</td>
<td>98.5%</td>
<td>59.7%</td>
<td>40.3%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1980</td>
<td>LMT</td>
<td>21,582</td>
<td>96.7%</td>
<td>67.5%</td>
<td>32.6%</td>
<td>N/A</td>
<td>$358</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>1,948</td>
<td>97.4%</td>
<td>57.9%</td>
<td>42.1%</td>
<td>N/A</td>
<td>$286</td>
</tr>
<tr>
<td>1990</td>
<td>LMT</td>
<td>23,868</td>
<td>94.5%</td>
<td>74.6%</td>
<td>25.4%</td>
<td>$282,600</td>
<td>$621</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>2,044</td>
<td>96.9%</td>
<td>56.1%</td>
<td>43.9%</td>
<td>$166,200</td>
<td>$514</td>
</tr>
<tr>
<td>2000</td>
<td>LMT</td>
<td>23,699</td>
<td>96.5%</td>
<td>75.5%</td>
<td>24.5%</td>
<td>$341,100</td>
<td>$904</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>1,981</td>
<td>96.1%</td>
<td>60.3%</td>
<td>39.7%</td>
<td>$222,400</td>
<td>$816</td>
</tr>
<tr>
<td>2010</td>
<td>LMT</td>
<td>24,198</td>
<td>93.9%</td>
<td>76.1%</td>
<td>23.9%</td>
<td>$551,100</td>
<td>$1,197</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>1,981</td>
<td>94%</td>
<td>60.8%</td>
<td>39.2%</td>
<td>$339,100</td>
<td>$1,121</td>
</tr>
<tr>
<td>2014</td>
<td>LMT</td>
<td>23,711</td>
<td>93.1%</td>
<td>76.4%</td>
<td>23.6%</td>
<td>$546,600</td>
<td>$1,366</td>
</tr>
<tr>
<td></td>
<td>Narberth</td>
<td>2,029</td>
<td>92.4%</td>
<td>60.2%</td>
<td>39.8%</td>
<td>$400,900</td>
<td>$1,236</td>
</tr>
</tbody>
</table>

Source: US Census 1960-2010; ACS, 2010-2014
Renter opportunities have not declined so dramatically in the Delaware County neighborhoods of Ardmore and Bryn Mawr. Remember, in these communities along the Delaware County boundary exists some of the more affordable housing, with a greater concentration of minority, low-income, and renter populations, as well as some of the oldest multifamily housing units in Lower Merion. For example, in West Ardmore 70% are renters, in East Ardmore 44% are renters, in East Bryn Mawr 57% are renters, and in West Bryn Mawr, 44% are renters (See Table 5-4; ACS, 2010-2014).

Analyzing this data illustrates the barriers for low-income and minority populations to multifamily housing. Even though multifamily opportunities are plentiful in the eastern part of the Township, the percentage of renters along the Philadelphia boundary lines have decreased. Multifamily units along the Philadelphia boundary are probably being used for homeownership purposes such as condos. Opportunities for more affordable rental opportunities are often concentrated in Ardmore and Bryn Mawr, which are located out of visible proximity of Philadelphia.

Currently, the Township is planning on building more apartments in Ardmore, along the Schuylkill River, and in Wynnewood, which would increase the number of rental properties by roughly 20% (Boccella, 2013; Heavens, 2016). However, these housing units are primarily targeted for young educated professionals, the elderly, and professors who teach in the colleges and universities in and around Lower Merion (Boccella, 2013). The data shows that these new plans for multifamily housing call for “quality apartments” aimed to target well-off tenants and not for lower income populations (Boccella, 2013).
Lower Merion Struggles to Effectuate Affordable Housing

Despite being a community of concentrated wealth, Lower Merion since the beginning has focused on the implications related to providing affordable housing for its existing poorer residents. This section discusses the history of affordable housing in Lower Merion from 1937 until today and how most of such housing opportunities focus on the elderly. The provision of affordable and moderate housing for families and its working-class population have proven problematic.

Addressing the development of low-income housing. The Township recognized the need to develop affordable housing since the 1937 comprehensive plan to confine and fix the substandard housing in the congested, poorer, working class neighborhoods of Ardmore, Bryn Mawr, and West Manayunk (Belmont Hills) (LMT, 1937). In 1936, 24% of the Township lived on less than 3% of its area. The 1937 comprehensive plan argued that the existence of a wealthy class and large estates created a need for housing to accommodate the workers who supply the wealthy with domestic, commercial, and municipal services (LMT, 1937, p. 113). The planners noted:

[T]he well to do who desire and can afford to live in the suburbs and have their business in the city. It is not possible to dismiss the housing problem for those of the lower wage scales by saying that, if proper housing is not available for them in the Township, it may be found outside of its borders. These workers cannot afford large transportation costs to their work and must live as close as possible to it. (LMT, 1937, p. 113)

Types of housing proved important to differentiate Lower Merion from Philadelphia. The recommendation was to build “group” houses or twin houses, but row housing was seen as city type housing and not desirable or necessary for their suburban community (LMT, 1937, p. 113). The 1937 comprehensive plan did not necessarily promise to construct new low-income housing, leaving such enterprise to private initiatives (p. 18).
The 1954 comprehensive plan addressed the substandard rental housing in the neighborhoods of West Ardmore, East Ardmore and North Ardmore based off a 1952 report conducted by the League of Women Voters of Lower Merion and the 1950 U.S. Census. These reports found that about 400 dwelling units were without baths or without bathroom facilities (LMT, 1954, p. 100). The 1954 comprehensive plan discussed substandard housing but failed to provide any explanation as to how to fix the problem. The 1962 comprehensive plan did not mention substandard or affordable housing at all.

After the 1968 Fair Housing Act, the Township conducted studies in low-income housing. As mentioned in the 1937 and 1954 comprehensive plans, the majority Black community of South Ardmore was subjected to poor housing conditions and scarcity of housing opportunities. The South Ardmore community argued that “purposeful exclusion” due to discriminatory housing practices constrained economic and geographic housing choices (LMT, 1970a, p. 1): “Past experience has shown that surrounding neighborhoods are closed to the Black community. Economic barriers exist and open housing laws have yet to be implemented to combat discriminatory practices effectively” (LMT, 1970a, p. 17). Due to these barriers, the Lower Merion NAACP wanted the Township to advance a plan to fund community development, acquire land for the development of low-to moderate housing, create additional housing units, improve existing housing structures, enforce the Fair Housing laws, and create an administrative structure that would enforce such plans (p. 1).

The Plan for Housing Community Improvements in the South Ardmore Community (1970) noted that housing is in short supply and too expensive. People do not leave their houses often because of the strong attachment to the community and the
fact that South Ardmore is one of the rare spaces in the suburbs where Black people can find decent housing (LMT, 1970a). The children of Ardmore find it hard to find homes because the houses are rarely vacated and the cost of housing is expensive (LMT, 1970a). Additionally, about 50% of the heads of household are 65 or older (LMT, 1970a).

Existing housing conditions were considered deficient, because older people are living in houses too large for their needs, and younger families are only able to find smaller homes or apartments due to lack of availability or cost (LMT, 1970a). Furthermore, the Township developed apartment dwellings in Ardmore by subdividing family homes not intended for such subdivision (LMT, 1970a).

Another housing study, titled Need for Low and Moderate Cost Housing, Cause of Blight (1970) focused on analyzing an economic model to discuss the need for low-income and moderate housing in Lower Merion, noting that it is necessary to provide housing for populations for the economic viability of the metropolitan economy. The report highlighted that there is an “undeniable right for people born in the area, living in the area to benefit from advantages of decent housing in the very same place whatever their income, so that they can enjoy the amenities of a community to the life of which they contribute” (LMT, 1970b, p. 1).

Yet, the Summary Report on the Feasibility of a Housing Program for Low and Moderate-Income Residents of Lower Merion Township (1977) discussed how the Township could not or would not find a spot to develop low-to-moderate income housing. The report included a letter by the former Township Manager stating, “[t]he Township will not make the necessary steps to support nor sponsor low-moderate income housing. The cost will be on developers, and zoning policies will not change to make
low-moderate income feasible” (Government Studies & Systems, Inc. & Jack McCormick & Associates, Inc., 1977, p. 1). This statement is important because it shows that municipalities have the power to limit or constrain the construction of low-income housing through zoning ordinances and policy (See MPC, 1968). The Township placed the onus of providing lower-income housing on private developers, not on the Township.

Two years later, the 1979 comprehensive plan did discuss the need to build multifamily homes and the need to maintain the quality of existing housing opportunities for low-to-moderate income families and the elderly. The plan called for the rehabilitation of housing in Bryn Mawr and Ardmore utilizing Community Block Development Grant (CBDG) funds, specifically along transportation and commercial centers.

These earlier housing documents exhibited Lower Merion’s willingness to discuss affordable housing opportunities for low-to moderate-income populations, but the documents did not signify actual development of such housing. In current housing documents, the conversation has continued regarding affordable housing. According to Lower Merion’s 2012 Analysis of Impediments to Fair Housing23 (AI) document, Lower Merion has five known impediments to Fair Housing: 1.) Lack of awareness regarding fair housing laws; 2.) Lack of awareness regarding the housing discrimination complaint process; 3.) Bias in lending, credit counseling and money management; 4.) Lack of

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23 Lower Merion Township is an entitlement district, meaning that the Township works directly with HUD for housing and community development funds instead of competing for funds with other Montgomery County municipalities (LMT, 2012). Lower Merion chooses to stay independent because the Township’s wealth would make it hard for them to compete for funds that are needed in municipalities with a greater concentration of lower-income populations (local official, 2016).
decent affordable housing; and 5.) Availability of housing for the Disabled\(^\text{24}\) (LMT, 2015, p. 7-12).

The first and second impediments relate to educating the public about the discrimination complaint process of the Fair Housing Act (1968) and the Pennsylvania Human Relations Act (1968). To resolve these impediments the Township plans on funding education and advocacy opportunities through local Fair Housing Rights groups and HUD. Furthermore, the Township did create a Fair Housing Task Force and enlisted bankers, residents, real estate agents, and landlords to address issues of impediments and discrimination in housing (LMT, 2015, p. 18).

The third and fourth impediments are of most interest because they directly involve racial and income discriminatory practices. The third impediment addresses bias in lending, credit counseling, and money management. In a 2002 analysis, the rate of denial for minority households had doubled that of White households in Lower Merion (LMT, 2012, p. 9). The AI argued that such inequity is due to a lack of credit history or poor credit history of minority buyers. What was not discussed is the way gatekeepers, such as banks contributes to inequitable lending practices (Hyra et al. 2013; Rugh, Albright, and Massey 2014). The Township’s solution set to provide local credit and budget counseling to residents (LMT, 2012). The fourth impediment addresses the lack of decent affordable housing in the Township. Despite the perception of wealth in the Township, such housing is needed. Approximately 17.8% of households in Lower Merion were in need of low-to-moderate housing in 2010 (LMT AI, 2012, p. 9).

\(^{24}\) Impediment Five, Availability of Housing for the Disabled is a concern. Between the 2005-2007 ACS, 8.8% of the Township’s population is disabled thus the Township is charged with accommodating housing to meet the needs of such population. According to the Fair Rights Center in Southeastern, PA, between 2006-2010 14 out of the 20 complaints in Lower Merion had to do with providing disability housing (LMT, 2012, p. 33).
Lower Merion does provide programs to help provide affordable housing. The Township use CBDG funds to rehabilitate existing housing specifically in lower income spaces. Additionally, the Lower Merion Affordable Housing Corporation (LMAHC) and Genesis Housing in Norristown operate Lower Merion’s Home Purchase program (LAMHC, n.d.). Lower Merion Affordable Housing Corporation was founded in 1995 to coordinate the establishment of more affordable housing in Lower Merion (LAMHC, n.d.). Genesis Housing obtains buyers in a non-discriminatory manner and provides low-income buyers with homeowner counseling (AI, 2012). According to the website, LMAH has three completed affordable housing projects in Bala, Cynwyd, Ardmore, and Bryn Mawr. These housing and rental properties allow for the Low Income Housing Tax Credit (LIHTC) to subsidize the cost of housing and help low-income populations to afford housing at below market value. LMAH gives special preference to populations currently living or working in Lower Merion, former residents, and active Lower Merion fire fighters (LMAHC, n.d., 2006).

According to the AI, the Township was in the process of enacting an affordable housing overlay ordinance, which would apply to commercial and mixed-use areas (LMT, 2012, p. 11). The ordinance could support new affordable housing units by applying subsidies and incentives to developers who are producing affordable and workplace housing in the Township (LMT, 2012, p. 11). It is not clear after a perusal of the Township Code that this ordinance is currently in effect.

Lower Merion also created the Lower Merion Township Human Relations Commission in 2010 to combat racial, color, age, religious, ancestry, sex, national origin, handicap or disability, sexual orientation, gender identity discrimination in employment,
housing, commercial property, and the use of public accommodations (AI, 2012; Human Relations Commission, n.d.). These housing projects and programs show that Lower Merion has the organizational structures in place to provide affordable housing; yet such enterprises have struggled to place a dent in the real need for housing for low-income and moderate-income families and disabled populations in and around Lower Merion. However, the Township does provide subsidized housing for the elderly.

**Providing elderly housing.** According to the Government Studies and Systems document (1977), elderly housing was more preferred than family affordable housing in Lower Merion. The Township argued that affordable multifamily housing, specifically for family purposes, requires socioeconomic and environmental assessments such as the amount of land between structures, number of automobiles, noise, the quantity of waste, and of course the need for security (Government Studies and Systems, 1977). Housing for the elderly negates such density problems because 75% of the applicants for moderate-income housing are single, 75% are women, less than 25% have cars, and they do not have children (Government Studies and Systems, 1977).

What is apparent is that Lower Merion seemingly has the spaces available to house low-to-moderate income families. The plethora of multifamily complexes, already located in high density, commercial and transportation centers could serve this function. One could interpret that some bias must exist within Lower Merion to house lower-income families that extend past the density argument. Fear of ‘outsiders’ utilizing the public goods of the Township of the school district and municipality was, of course, not discussed. According to the 2012 AI, Lower Merion is seeking to construct more low-income housing for the elderly (LMT, 2012).
Redefining affordable housing. About 110 years after Lower Merion’s first Comprehensive Plan, Lower Merion struggles to provide affordable housing, or even reasonable housing for its residents. Due to the extremely high pricing of the homes and the high rental costs, those employees who work for and in Lower Merion cannot afford to live in Lower Merion (resident, 2016). A resident historian of Lower Merion indicated that there was a time in the 1960s through the 1980s that people worked and lived in Lower Merion, but that combination is very rare today. He has argued at planning meetings for the urgency to create housing for employees (resident, 2016) since there is a real need for such housing. In 2011, 93% of 36,301 persons employed in Lower Merion Township commute from outside the Township to access their jobs (LMT, 2016, p. 249).

This complaint has made its way into the 2016 comprehensive plan. The plan redefines affordable housing as not just a term for low-income, subsidized housing, but for the “policemen, firemen, shop owners, and private sector employees who can no longer afford to live in communities in which they work as the housing prices and rents of traditionally affordable neighborhoods have trended upwards” (p. 322). The municipality recognizes the need to develop options for residents at all stages of life; that includes providing housing for the elderly and affordable housing for residents. Failing to do so undermines the social and economic diversity of their community. In a discussion concerning amendments to the Mixed Use Special Transit (MUST) Overlay ordinance, neighborhood civic associations such as the North Ardmore Civic Association, ArdWood Civic Association, and the Wynnewood Civic Association proposed that the Township amend the affordable housing incentive provisions to set a standard that affordable housing is “generally affordable.” The proposal argued for a standard utilizing
the median wages of non-managerial Township staff as a measure for affordability (LMT, n.d.-a, p. 1; See LMT, n.d.-b).

   The housing policy in Lower Merion highlights the duality between the municipality’s actions versus intent. On the surface, Lower Merion has encouraging affordable housing rhetoric and policies that speak on providing for a socioeconomic diverse population. However, in terms of outcomes, it seems that the purpose of Lower Merion’s housing policy is to maintain and protect the affluence and wealth of the Main Line. The high cost of housing, the location of minority and lower income communities out of sight of the Philadelphia boundaries, decreasing renter opportunities along the Philadelphia boundaries, and the provision of affordable housing for the elderly are tactics that prevent low-to-moderate income families from Philadelphia to access Lower Merion.

   Conclusion

   The Lower Merion School District is segregated demographically from other Montgomery County and Philadelphia County school districts because its municipalities have constructed an economic, physical, and albeit cultural wall that have kept out minority and low-income communities; while replenishing its White and wealthy populations.

   At the heart of Lower Merion’s development was the Main Line railroad. The Main Line brought in Philadelphia’s most affluent and influential populations, and became the densest concentration of wealth in the Commonwealth of Pennsylvania (Geller, 1970). The Main Line also brought in workers to serve as domestic employees to the wealthy White homeowners and laborers in the factories; thus, creating a
socioeconomic dynamic of the “Have Not’s” and the “Have Mores” (school official, 2016). From the time of its inception, Lower Merion has maintained this dynamic by perpetuating innovative zoning and housing policies.

First, Lower Merion Township became the first municipality in the country to cultivate a zoning code, focusing on protecting the wealth of the district for generations. Such zoning policies included developing high-end commercial centers supplementing tax revenues to provide for the high-end services for the communities. Commercial spaces like City Ave or the “Golden Mile” also serve as an economic and physical buffer system between the residential communities in Lower Merion and Philadelphia. Furthermore, the Township excluded high-density development in the western half to preserve the high value of the land. The Township also confined, segregated the historical low-income, working class, Black populations along the Delaware County line in Ardmore and Bryn Mawr, out of the line of sight of the Philadelphia boundary lines. Thus, maintaining the perception that Black and poor populations don’t exist in such a place. Lower Merion and Narberth stayed relatively White and affluent because their adjacent Philadelphia neighborhoods did not undergo severe racial and economic changes within the last sixty years.

Second, Lower Merion and Narberth’s housing policies also cultivated a barrier, especially for low-to moderate-income populations to access. The cost of housing in Lower Merion and Narberth are the highest in Montgomery County, and some neighborhoods represent the highest incomes and housing costs in the country. Even though Lower Merion and Narberth boasts a range of housing types, multifamily housing, renter populations specifically along the Philadelphia boundary lines have significantly
declined, leading to the conclusion that a majority of such housing are used for homeownership purposes. Large renter and multifamily housing are again confined along the Delaware County line of Ardmore and Bryn Mawr. Affordable housing is limited, with such spaces afforded to the elderly and those who already live or lived in the Township. Most people, whether low-income or middle-class populations, cannot afford to live in Lower Merion or Narberth.

Lower Merion and Narberth represents Lower Merion’s slogan as “A great place to live in,” and has lived in esteem since its founding. Yet, its quality and its influence are steeped in the perpetuation of the status quo, where one’s economic wealth and at times race determines the quality of a space. Maintaining such quality through enacting of barriers through zoning and housing policies, keeping out undesirable populations and keeping in desirable ones are perceived to be essential and necessary to the life of a district. These decisions helped the demographic shaping of the Lower Merion’s school district’s cultural identity and population.
Chapter Six

Lower Merion School District: The Promise of the Main Line

Introduction

In a Philadelphia Inquirer article, Heavens (2016) signified that “what unites the township… and has always been its chief selling point… is the Lower Merion School District, among the 25 best in the United States.” For a lot of families, the main reason for the move to the suburbs, and to Lower Merion is for the schools (Heavens, 2016; Holmes, 2002).

Established in 1834, Lower Merion School District is considered one of the first public school districts in the Commonwealth of Pennsylvania (Goldsborough, 2010; Toll & Schwager, 1983). However, schools have operated in Lower Merion and Narberth since the Township’s founding in 1682 (Jones, 2000). In 1966, Narberth Borough consolidated with Lower Merion Township, to form the modern Lower Merion School District (LMSD, 1979). Today, with its ten schools\(^\text{25}\) and 8,000 plus student body, Lower Merion School District has developed a reputation as being one of the best school districts in Pennsylvania and the nation (2017 Best School Districts in Pennsylvania, 2017).

Lower Merion Township also houses elite private schools and universities. Former school district personnel argued that Lower Merion does not necessarily compete against other Montgomery County public schools but the plethora of private school

\(^{25}\) Lower Merion School District has five elementary schools (Belmont Hills, Cynwyd, Gladwyne, Merion, Penn Valley, and Penn Wynne Elementary School), two middle schools (Bala Cynwyd and Welsh Valley Middle School), and two high schools (Harriton and Lower Merion High School) (LMSD, n.d.-c).
options in the area, such as the Baldwin School, Merion Mercy Academy, Villanova Academy, The Haverford School, Friends Central School, and various religious institutions (LMT, 2016). During the 2013-2014 school year, about 30% of the school age students in Lower Merion Township attended private schools (2010-2014; See Table 1). Additionally, Lower Merion Township has six higher education institutions that brings to the Township highly educated students, professors, and administrators. About 75% of the Township’s population have a bachelor’s degree or higher (ACS, 2010-2014). Thus, making the Township one of the highest educated concentrations in the county and state (LMT, 2016).

Even though the public schools are free, accessing the municipality is not. As discussed in the previous chapter, the zoning and housing policies of Lower Merion Township systematically protected the affluence of the Main Line, with the high real estate market and zoning policies favoring accessibility of the wealthiest families, while excluding outside minority and low-to-moderate income populations. Such policies shaped the boundaries in which the school district derives its student body. However, queries still persist as to the role schools play in response to or in contrary to the Lower Merion Township’s policies of exclusion.

**Findings Summary**

This chapter explicitly focuses on the impact of educational policies of the Lower Merion School District (LMSD) on the demographic composition of the student enrollment and the constitution of the boundaries of Lower Merion and Narberth Borough. Utilizing Lower Merion Township’s zoning and housing findings; Lower Merion School District serves as a passive and active arbiter in the exclusion of minority
and low-income students within the municipalities’ boundaries. Lower Merion Township already created an impenetrable boundary wall that maintained the wealth and Whiteness of its overall population through zoning and housing policies. Thus, the school district does not have to do much to maintain a White and affluent student population. Nonetheless, the data does recognize the role LMSD plays in actively reinforcing the segregation between municipalities and students.

The data elicited three conclusions. First, LMSD’s status as a high quality, Main Line school district in combination with the high cost of living, replenishes the stock of upper class White and, to a smaller extent, Asian families to the district. Second, Black and low-income student populations in the Lower Merion are often hidden. The district struggles to effectively address the needs of these populations. Finally, Lower Merion School District uses non-resident student policies to keep out students who do not live in the jurisdiction and cannot afford to access the district.

The Quality of the School District and Municipal Zoning and Housing Policies

Replenishes the Stock of Upper Class, Educated White Families to the District

Lower Merion School District’s quality status and the Township’s multiple educational, institutional, and employment resources may have contributed to families flocking to the Township (Warner, 1987d; Heavens, 2016; LMT, 2016). Over the past eight years LMSD is the fastest growing school district in Pennsylvania in total students (LMSD Planning for Growing Enrollment, n.d.). Despite a drop in enrollment during the 1970s and 1980s, Lower Merion School District has grown steadily since 1990 (See Table 6-1). From 1990 to 2014, the enrollment percentage grew by 51% (NCES, 1989-1990; 2013-2014).
Table 6-1: LMSD enrollment and population changes from 1960-2014

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL Narberth</td>
<td>64,529</td>
<td>67,543</td>
<td>64,147</td>
<td>62,281</td>
<td>64,083</td>
<td>62,107</td>
<td>62,568</td>
</tr>
<tr>
<td>and LMT</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pop % Change</td>
<td>19.2%</td>
<td>4.67%</td>
<td>-5%</td>
<td>-2.9%</td>
<td>2.9%</td>
<td>-3.1%</td>
<td>0.7%</td>
</tr>
<tr>
<td>LMSD Enrollment</td>
<td>9,219</td>
<td>10,119</td>
<td>6,854</td>
<td>5,223</td>
<td>6,396</td>
<td>7,009</td>
<td>7,895</td>
</tr>
<tr>
<td>LMSD Enrollment</td>
<td>N/A</td>
<td>9.76%</td>
<td>-32.3%</td>
<td>-18.8%</td>
<td>22.5%</td>
<td>9.6%</td>
<td>11.2%</td>
</tr>
<tr>
<td>% of School Age</td>
<td>35%*</td>
<td>N/A</td>
<td>39.4%*</td>
<td>40.8%</td>
<td>38.7%</td>
<td>36.6%</td>
<td>31%</td>
</tr>
<tr>
<td>Children in</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private School</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(K-12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


* This percentage only includes K-12 students living in Lower Merion Township. The 1960-1980 US Census did not include Narberth Borough’s private school enrollment percentage.

Montgomery County Planning Commission (MC) (2015d) report on Lower Merion’s enrollment, attributes three factors to the growth: 1.) Families are choosing public schools and not private schools; 2.) Multifamily homes and rental apartments are providing larger numbers of public school students than before; and 3.) Families are choosing to move to Lower Merion Township. Home sales have increased at a greater rate of public school students compared to those who are leaving the district (MC, 2015d). To handle the enrollment and population changes, in the 1990s Lower Merion reopened Belmont Hills Elementary School (LMSD, 1989; LMSD, 2014). The district also rebuilt two state-of-the-art high schools in 2010, costing $210 million (Boccella, 2013).

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26 The 1950 total population from Lower Merion Township and Narberth Borough is 54,152 (US Census, 1950).
I wanted to further investigate the County’s claim that the rise of multifamily housing in Lower Merion would attribute to the rise of public school children. The report on Lower Merion’s enrollment also specified “that newly developed single family detached housing is 15 times more likely to contain a school age child than multifamily housing” (MC, 2015d, p. 15). In LMSD, even though multifamily housing has led to a growth of public school children, the rate is very low at about 0.08 public school students per multifamily unit in the 2014-15 school year (MC, 2015d, p. 15). This analysis fits with the findings in Chapter Five, which discussed the use of multifamily housing in Lower Merion Township. A plethora of multifamily housing exists in the Township, but new apartment dwellings are targeting young educated professionals, the elderly, and professors who teach at the universities (Boccella, 2013; See Chapter Five). Even though renter opportunities exist, specifically along the Delaware County in Ardmore and Bryn Mawr, renter opportunities have precipitously declined along the Philadelphia boundaries, which may have real implications in preventing minority and low-income students from accessing the district.

Taken together with the rising housing and rental prices, the populations moving in mass to these spaces are extremely affluent. One school administrator noted that to pay for the state-of-the-art programs and buildings, they need a high tax base. During the 2013-2014 school year LMSD spent $27,421 per student, while the school district of Philadelphia only spent $13,459 per student (Spending, 2013-2014). Lower Merion’s cost per student is the third highest of the 501 school districts in the Commonwealth of Pennsylvania (School Taxes, 2013-2014). For decades, the Lower Merion School
District raised taxes to pay for programs to maintain such quality. The inequities between these two school districts highlight how wealth and affluence perpetuates wealth and affluence.

Economically, LMSD has one of the least socioeconomic diverse student populations in Montgomery County. According to the NCES data for the 2013-2014 school year, LMSD has the second lowest Free and Reduced Price Lunch (FRPL) percentage (8.5%) out of the other 23 school districts in Montgomery County.

Yet, LMSD compares itself to other “high achieving” Main Line districts, asserting itself as the “largest and most diverse [district]… where low-income student population is 43% larger than Tredyffrin-Easttown and 17% larger than Radnor” (LMSD, n.d.-c). Table 6-2 addresses this claim, comparing Main Line school districts racial and FRPL student demographics with Montgomery County inner ring suburban school districts. In regard to socioeconomic demographics, the Main Line districts have a lower FRPL, and a larger White and Asian population than the inner ring Montgomery County districts, except for Lower Moreland School District. Because Lower Merion is larger, it may claim that its district is more diverse in total numbers compared to other Main Line districts. However, in terms of percentages, Lower Merion School District is on par

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27 In a recent case, the residents of Lower Merion Township are currently suing the school district, holding that the school district unlawfully raised taxes in order to stash away millions in reserve between 2010 through 2015. The school district claimed that it would face a multi-million-dollar deficit in paying for special education and teacher pensions. However, instead, the school district was holding multi-million-dollar surpluses (DiStefano, 2016). Between 2011-2012, the district projected a $5.1 million deficit, but ended up with a $15.5 million surplus (Boccell, 2016). The Montgomery County judge rescinded the tax increase above the 2.4% state limit (DiStefano, 2016).

28 Lower Moreland School District, a northeast inner ring Montgomery County district, has the lowest FRPL in the county at 7.5% and has one of the smallest Black populations at 1%. Like Lower Merion, Lower Moreland is insulated from demographic changes. The northeast Philadelphia neighborhoods and Bucks County municipalities surrounding Lower Moreland are majority White.
with other Main Line districts regarding its low socioeconomic and racial diversity populations (See Table 6-2).

**Table 6-2: Enrollment, Race, and FRPL comparisons of the Main Line and inner ring Montgomery County school districts (2013-2014)**

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>School District</th>
<th>Enrollment</th>
<th>White</th>
<th>Black</th>
<th>Asian</th>
<th>Hispanic</th>
<th>FRPL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main Line</strong></td>
<td>Lower Merion</td>
<td>7,895</td>
<td>76.9%</td>
<td>7.8%</td>
<td>9.3%</td>
<td>3.2%</td>
<td>8.3%</td>
</tr>
<tr>
<td></td>
<td>Haverford</td>
<td>5,806</td>
<td>85.7%</td>
<td>4.4%</td>
<td>5.1%</td>
<td>2.1%</td>
<td>12.2%</td>
</tr>
<tr>
<td></td>
<td>Radnor</td>
<td>3,605</td>
<td>75.8%</td>
<td>4.6%</td>
<td>15.1%</td>
<td>3.9%</td>
<td>9.3%</td>
</tr>
<tr>
<td></td>
<td>Tredyffrin-</td>
<td>6,537</td>
<td>76.3%</td>
<td>3.3%</td>
<td>15.8%</td>
<td>2.4%</td>
<td>5.6%</td>
</tr>
<tr>
<td></td>
<td>Easttown</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Inner Ring</strong></td>
<td>Springfield</td>
<td>2,229</td>
<td>76%</td>
<td>13%</td>
<td>3.4%</td>
<td>4.4%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Montgomery</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td>Cheltenham</td>
<td>4,561</td>
<td>36.8%</td>
<td>50.3%</td>
<td>7.6%</td>
<td>3.7%</td>
<td>23.7%</td>
</tr>
<tr>
<td></td>
<td>Abington</td>
<td>7,639</td>
<td>65.5%</td>
<td>20.3%</td>
<td>4.6%</td>
<td>6%</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>Lower Moreland</td>
<td>2,158</td>
<td>80.5%</td>
<td>1%</td>
<td>15.4%</td>
<td>1.9%</td>
<td>7.5%</td>
</tr>
</tbody>
</table>

Source: NCES, 2013-2014

This connection and comparison to other Main Line school districts also impacts policy and curriculum decisions. According to the school board minutes in the 1980s and 1990s, Lower Merion formed a Main Line Consortia with Haverford and Radnor School District. The Main Line Consortia focused on the dispersing and usage of federal funds “to provide public and non-public educationally disadvantaged children with pre-school and remedial programs” through the Main Line Learning Project (LMSD, 1983, May 13; 1990, May 16; 1990, April 20).

Other programs such as providing vocational technical schools in the 1980s and 90s allowed students to use either Delaware County Vocational Technical School or Central Montgomery Area Vocational Technical School (LMSD, 1988, Sept, 26).

According to the LMSD Long Range Plan 1979-1983, LMSD declined to join with other Montgomery County school districts that formed the Central Montgomery Area Vocational Technical School, because “In recent years, little or no space has been
available in the more desirable courses. Lower Merion is an affluent school district. Those students who desire vocational or technical training reflect a small number” (LMSD, 1979, Section 1). Ten years later in the Long Range Plan (1989-1993), LMSD seemed to change its perception on vocational technical education. One of the school districts goals was to make vocational school more appealing to pupils (LMSD, 1989, p. 109).

Black and Low-Income Student Populations in the District are Often Hidden, and the District Struggle to Effectively Address the Needs of this Population

Lower Merion School District has gone through some form of racial transition due to its Asian and Hispanic populations between 1978 and 2014, growing from a non-White population of 8.5% to 23% (See Table 6-3). However, as discussed in Chapter Five, zoning and housing boundaries have helped to stymie the growth of the Black student population in Lower Merion, where they have stagnated at 8-9% since 1978.

Lower Merion’s insistence of using other Main Line school districts as a litmus test of its racial and economic diversity glosses over its lack of inclusion of Black and lower-income populations especially in comparison to other inner ring school districts in Montgomery County (See Table 6-2). Analyzing Lower Merion School District’s policies regarding its Black population requires an acknowledgment that the school district does not deal with an influx of incoming Black student population from outside its borders. These policies, positive or detrimental, personally impact the Black community that lived in Lower Merion, specifically in Ardmore, for generations.

The data shows that Lower Merion School District have implemented racially charged education policies regarding minority teachers, types of school Black students
are relegated to, redistricting plans, and tracking. Even though low-income and Black students are often hidden within the confines of the district and Township, racial issues in the Lower Merion School District have not whimpered but caused heated debates and mobilized the Black community to demand for change and recognition. These debates related to how the school district educates, perceives, and works with its Black populations can also serve as a sign to other minority communities outside of its boundaries, who might be able to afford Lower Merion, that perhaps they are not wanted. However, at the same time, these debates may have also mobilized the school district to implement better policies to educate its minority students.

**Table 6-3: LMSD racial demographics (1978-2014)**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower Merion School District</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>91.5%</td>
<td>88.2%</td>
<td>86.1%</td>
<td>79.9%</td>
<td>76.9%</td>
</tr>
<tr>
<td>Black</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>6.6%</td>
<td>7.5%</td>
<td>7.7%</td>
<td>8.5%</td>
<td>7.8%</td>
</tr>
<tr>
<td>Asian</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>1.3%</td>
<td>3.5%</td>
<td>4%</td>
<td>7.9%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>0.4%</td>
<td>0.8%</td>
<td>1.5%</td>
<td>2.2%</td>
<td>3.2%</td>
</tr>
<tr>
<td>FRPL</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>4.4%</td>
<td>6.7%</td>
<td>8.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lower Merion School District Non-White</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
</tr>
</tbody>
</table>

Source: LMSD, 1979; NCES 1990-2014

Note: NCES school district data did not exist prior to 1987. A 1979 LMSD document did provide school district racial data but only from the 1978-1979 school year.

**History of Segregated Schools**

The Main Line NAACP in the 1930s formed out of protest over an effort to segregate schools in Berwyn Township in Chester County (Williams, 1985). Lower Merion School District operated its own particularly segregated elementary school, the Ardmore Avenue School, located in Ardmore (Holmes, 2013; Goldsborough, 2010). The book, Montgomery County: The Second Hundred Years, recognized that the migration of
Black populations and the act of confining 117 Black children in Ardmore Avenue and 73 at Bryn Mawr schools in 1919 ignited a race problem “bound to assert itself more each year” in Lower Merion Township (Toll & Schwager, 1983).

Ardmore Avenue student body was approximately 20% White and 80% Black in the 1960’s, even though in 1963, Black students represented only 9% of the total student body (Holmes, 2013; O’Laughlin, 2013). The White students attending the school, were predominately special education students, taught in separate classrooms, and bussed in across the district (Stein, 2013; Holmes, 2013). Students at Ardmore Avenue attended class in a dilapidated building and received limited educational opportunities compared to their White peers attending all White schools (Stein, 2013; Holmes, 2013). The NAACP argued that the students enrolled did not receive an equal education thus fueling calls to shut down the segregated school. In 1963, the Lower Merion School District school board decided through a unanimous vote to close the school. A lifelong Ardmore resident takes offense to the phrase “the school board decided” for closing the school. She claimed that “[the school board] did not decide. It was under protest. We needed equal education. That is how it all got started” (Stein, 2013). The Ardmore Avenue School was torn down in 1985, and is now the site of the Ardmore House, a low-income HUD subsidized elderly home (Holmes, 2013). The elementary school students were then bussed to the other four, predominately White, schools (Holmes, 2013).

The closing of Ardmore Avenue Elementary School in 1963 is recognized and celebrated as the School District’s “Moment of Integration” (Holmes, 2013). The remembrance celebration events included acknowledging the role the NAACP played in fighting for integrated schools through school assemblies, documentaries, and plan to
incorporate such a moment in the curriculum (Stein, 2013). This outward celebration of the “Moment of Integration” did not mean that the school district excised vestiges of segregation and discrimination in 1963. Lower Merion School District continues to struggle with racial inequality.

**Dearth in Minority Teachers**

In 1966, the Main Line NAACP called for the immediate resignation of the then superintendent of schools when he referred to Negroes as “nigras” (Porter, 1966, p. 4). The NAACP used this opportunity to call out the inadequacy of the diversity of the teacher force in Lower Merion. In a letter addressed to the superintendent, the NAACP argued,

> It is more than obvious that you are in complete accord with the Lower Merion Board of Education’s discriminatory policy in the hiring of qualified Negroes. One out of 500 and 12 teachers is conclusive evidence of your intolerable attitude, particularly since in the final analysis all appointments are made by you… We are tremendously embarrassed, humiliated, and amazed at your continued inability or deliberate slur in the use of the word Negro… [W]e are American Negroes and as such are entitled to respect, human dignity, and all the grand pursuit of happiness accorded to every American.” (Porter, 1966, p. 4)

In 1967, a special committee was formed to hire Black personnel to the Lower Merion School District (Launch Drive for Teachers, 1967). The school district noted that even if the Black student population stood at 3%, it was important to provide students an integrated experience by having Black teachers. The school district came to this decision after marked protests by the NAACP and a mass walkout of 200 Black parents from the school board meeting (NAACP Probing School Hiring, 1967; Launch Drive for Teachers, 1967). After the protests, the school district hired four Black teachers. Four out of 520 teachers in their 15 schools were Black (NAACP Probing School Hiring, 1967).
The then superintendent argued that the lack of Black teachers was a constant problem that all suburban school districts face and not a unique problem of Lower Merion School District. He attempted to make excuses stating, “Negroes show a preference for working in city schools. One reason is probably that they live in the city” (NAACP Probing School Hiring 1967, p. 1). The Philadelphia Tribune article noted that Black teachers were refusing the position in the school district because of distance of travel or because of better job offers (Launch Drive for Teachers, 1967 p. 1). What may have been ignored in the superintendent’s analysis is that Black teachers’ preferences are also based on where they can access. Even though a small Black population existed in Lower Merion for generations, Black populations from the city have been systematically blocked from entry in suburban communities due to high housing costs and exclusionary zoning policies (Freund, 2007; Rothstein, 2017; See Chapter Five).

To potentially aid in employing a diverse district staff cadre and to protect minority students from discrimination, LMSD adopted an Equal Employment Opportunity and Equal Educational Opportunity Policy in 1979 (LMSD, 1979). The Equal Employment Opportunity policy held that:

> Personnel procedures and practices with regard to recruitment and recruitment advertising, promotion, transfer, compensation, demotions, lay-off, termination and all other conditions of employment are administered with due regard to job performance, experience, qualifications, but without discrimination because of race, color, religion, sex, age, national origin or handicap. (LMSD, 1979)

Lower Merion School District also instituted a hiring practice where if two applicants were equal, they would hire the minority applicant. Yet the LMSD issued a caveat in the 1979 document that they were not presently recruiting nor hiring professional staff such as teachers or administrators. However, they are “constantly employing bus drivers and
seek minority group applicants for these positions” (LMSD, 1979). With this statement, the District negated the promise of their equal employment policy by perpetuating the confinement of minority staffing in non-professional positions, relegating them to position of bus drivers. This statement manifests the perception that it is okay for minority and White students to see Black employees as bus drivers, but not teachers.

Lower Merion continued to discuss their dearth of hiring minority staff in the late 1980s, in the LMSD Long Range Plan (1989-1993). The document indicated that their goal would be to increase the number of minority staff members in all areas of employment (LMSD, 1989, p. 104). In 1989, Lower Merion had only one (0.4%) minority administrative staff (superintendent, assistant superintendent, principal, assistant principal) out of 25 total employed; 19 (4.5%) professional staff (teachers, nurses, counselors, librarians) out of 420 employed; and 67 (18.4%) support staff (clerical, custodial, cafeteria workers) out of 364 employed.

Presently, Lower Merion has made serious strides. Lower Merion School District now has a Black superintendent and two Black women school board members, but it is unclear as to the percentage of minority administrative, professional, and support staff.

**Educational Opportunities for Minority Students**

In regard to the district’s Equal Educational Opportunity Policy, the school district held that “no student shall be denied access to a free and full public education on account of race, color, religion, sex, age, national origin, marital status or handicap, with particular emphasis on providing for the equal education of minority and handicapped students (LMSD, 1979). The LMSD school board minutes, unlike the policies, very rarely addressed issues of race.
A 1986 Philadelphia Inquirer article about Cheltenham School District (See Chapter Seven and Eight) and Lower Merion School District discussed these districts’ problems with combatting the legacy of racism and low expectation of Black students (Klein, 1986b). According to the article, in LMSD, Black students are underrepresented in school activities, honors classes, and programs for the gifted. In 1986, LMSD only had four African Americans in the “Challenge” or Gifted and Talented (G/T) Program. Participants of the article argue that “in Lower Merion, an ongoing administration study of Black student achievement has suggested that Black students feel invisible and isolated in the district’s schools” and that conditions have not changed very much since 1963 (Klein, 1986b).

Lower Merion’s Black families have lived on the Main Line for generations, meaning that parents are graduates of the school district that their grandparents attended and that their child now attends. The then director of pupil services explained that parents’ experiences with racism in the schools have shaped their children’s perspectives of the schools themselves. The teachers and administrators in the Philadelphia Inquirer reflected that Black students are capable but lack motivation, or that Black students cannot live up to the expectations of high performance (Klein, 1986b). These statements of lack of motivation or failing to live up to the high standards again disregards the role that overwhelmingly White affluent school districts participate in failing to reach diverse students.

In 1997, to help remedy the disconnect between the Black student population and the LMSD to address the needs of such students, the district and key Black constituents created CARE, the Committee Addressing Race in Education (LMSD, n.d.-a). This
program serves as a vehicle to openly discuss how race impacts the educational direction, policies, curriculum, and behaviors in the Lower Merion School District (LMSD, n.d.-a.; school official, 2016).

A recent interviewee cited the achievement gap is a continual problem in Lower Merion but that the school district could fix it in the next upcoming decade (school official, 2016). According to the 2013 Educational Equity Report from the Civil Rights Data Collection (CRDC), out of the 997 students enrolled in the Gifted and Talented (G/T) program at LMSD, about 41 or 4.1% are Black and 21 or 2.1% are Hispanic. Out of the 851 students enrolled in Advanced Placement (AP)/International Baccalaureate (IB) programs, 48 or 5.6% are Black and 17 or 2% are Hispanic (CRDC, 2013). Although these numbers are still low, this is a far cry from the 4 Black students enrolled in the “Challenge” or G/T Program in 1986 (Klein, 1986b).

Breaking these percentages down further show that Black students are least likely to be placed in academically enriched programs in Lower Merion School District. Out of LMSD’s 7,836 student enrollment in schools offering Gifted and Talented only 6% of the 619 Black students in the district are in G/T, compared to 8% of the 253 Hispanic students, 12% of the 6,007 White students, and 21% of the 736 Asian students (CRDC, 2013). The percentages are higher for Black students in terms of student enrollment in AP/IB. Approximately 18% out of 260 Black students enrolled in a high school with AP/IB are taking AP/IB courses. However, this percentage still doesn’t compete with White and Asian students. About 34% of all White students take AP/IB courses, and 60% of all Asian students take AP/IB courses (CRDC, 2013). A gap indubitably exits.
To remedy this gap through conversations with CARE, counselors are told to identify students of color to advanced placement classes. The district also implemented a summer bridge program so that students can take calculus in high school. The Power Becton Program partners with universities to offer mentor opportunities with Black engineers, doctors, and professors for Black students (school official, 2016).

Despite these programs that seek to bridge a gap between the Black community and LMSD, concerns of racism and discrimination still impacts the educational opportunities of Black students. In 2012, former students and parents sued LMSD for the disproportionate placement of Black students into special education classes (Mitchell, 2011). The 3rd Circuit Court in the case, *Blunt v. LMSD* (2014) found that even though statistical evidence shows that minorities are overrepresented in low achievement classes, “there is no genuine issue of material fact concerning Lower Merion’s intent to discriminate” (p. 257).

Prior to *Blunt*, Lower Merion was embroiled in another bitter lawsuit regarding race, when the school district attempted to redistrict their school boundaries in 2008 after the re-construction of LMSD’s two high schools, Harriton High School and Lower Merion High School. To ensure that both schools have equal enrollment, the school district set to redistrict the high school boundaries. The problem was that Harriton High

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29 The earlier case, *Durrell v. Lower Merion School District* (2012) claimed that the school district placed a Black student in special education, even though she did not have a disability.
30 The plan that the district chose was Plan 3R. Plan 3 was a “3-1-1 Feeder Pattern” which sends students districted to three elementary schools to attend one middle school and then to one high school. Students districted to Cynwyd, Merion, and Penn Wynne Elementary on the eastern side of the district would attend Bala Cynwyd Middle School and then Lower Merion High School (LMHS). Belmont Hills, Pen Valley, and Gladwyne Elementary were districted to Welsh Valley Middle School and then to Harriton High School. Under Plan 3R, Lower Merion High School’s approved historic walk zone did not include those living in South Ardmore and North Ardmore, where there was a high concentration of Black students. Students assigned to LMHS and all students in the historic walk zone could choose to attend either high
School, located in the western district pulled less students and less minority students than Lower Merion High School, so the school district decided to re-draw the lines where some students who lived closer (walking distance) to Lower Merion High School would have to attend Harriton High School (Cook, 2008). This plan disproportionately impacted the neighborhoods of South Ardmore and North Ardmore, which had the highest concentration of Black students in the district, forcing these students to be bussed across the district even though they could walk to Lower Merion High School (Cook, 2008).

The NAACP and Black students sued the school district, alleging that the district violated the Equal Protection Clause of the 14th Amendment, Title VI of the Civil Rights Act, by targeting students for redistricting based on race (Doe v. Lower Merion School District (2011)). The Black families in Ardmore argued that the plan places the burden on Black students who are concentrated in Ardmore. Of the 214 students redistricted, 45 or 21% of those were Black (Doe, 2011, p. 538). Like Blunt, this case reached the 3rd Circuit, where the Court sided with the school district. The Court held that the redistricting plan was constitutional,

> because it does not select students based on racial classifications, it does not use race to assign benefits or burdens in the school assignment process, it does not apply the plan in a discriminatory manner, and it does not have a discriminatory purpose.31 (Doe, 2011, p. 529)

The Court further argued that the plan is neutral on its face, and that Lower Merion assigned students based upon geographical area in which they lived (Doe, 2011). Lower school, but those assigned to Harriton who did not live within the historic walk zone did not have the option of attending LMHS (Doe v. Lower Merion School District, 2011).

31 Because the redistricting plan did not have a racially discriminatory purpose, strict scrutiny as a test to determine the constitutionality of the plan did not apply. The Court applied rational basis, and the School District met the rational basis test (Doe, 2011).
Merion relied on the existence of de facto segregation patterns to force the already small percentage of Black students to “take one for the team” to integrate its schools (Doe, 2011, p. 538). The Lower Merion redistricting case is renowned nationally because the courts upheld a school assignment plan that considered race and utilized residential boundaries characterized by race to desegregate its schools (Kotok, et. al., 2015).

Ironically, in spite of the pain and the cost of litigating this redistricting case, the enrollment spikes in Lower Merion School District will force the district to convert space in the administration building, located next to Lower Merion High School, into classrooms. Therefore, some of the students from Ardmore that have been bussed to Harriton could choose to attend Lower Merion High School. Thus, turning back the clock before the 2009-redistricting plan (Boccella, 2013; Parks, 2013).

These two pivotal education cases exposed the bitter racial divisions in Lower Merion, and seemingly stained Lower Merion’s glowing reputation of its school district. Probably in light of these recent court and cultural battles, the district promoted their strategic plan, titled “All Forward: Strategic Pathways for Lower Merion School District” in 2014 (LMSD, 2014). The purpose of the plan was to reimagine public education through a partnership between the school and community, and focused on promoting more inclusion of their diverse community. Some key points include applying a social justice/equity lens to themes in the curriculum, reducing standardized testing, closing achievement gaps, and access and opportunity gaps, and to build trust within the community. Furthermore, the school district in 2016 adopted a Gender Expansive & Transgender (GET) Equity and Nondiscrimination policy (LMSD, 2016). The school
district acknowledged that a chasm exists between the school district and the individual communities in which it serves. LMSD recognized that,

… there has often been a disconnect between our schools and the diverse community that surrounds us—both in making best use of the myriad resources we share and in the ways we communicate and build trust. In an era, of public education where maintain programs and preserving the status quo is seen as a significant achievement, we see an opportunity to grow, innovate, and lead as never before—but only if we learn to harness the power and spirit of the community.” (2016, p. 21).

Lower Merion’s willingness to reevaluate its educational purpose, curriculum, and rhetoric of course may run against its tendency to perpetuate the Main Line status quo (Interviewee, 2016). In a school district that is the shiny example of the Main Line, situated in a pocket of wealth and Whiteness, the school district has struggled in the past to address the needs, concerns, and value of its Black population. More research will determine the impact of these equity policies on the individual populations in Lower Merion, and the effect of bringing more Black teachers, administrators, and students to the Township.

**Use of Non-Resident Student Policies to Exclude Students**

Despite strong zoning and housing policies maintaining the boundary structure surrounding the Lower Merion School District, the district itself did implement non-resident student policies to reinforce those boundaries, especially in times of strife within the School District of Philadelphia (SDP).

Newspaper articles in the 1980s and 1990s discussed the impact of the SDP on inner ring suburban school districts. In 1981, Philadelphia’s teacher strike persisted for 50 days, leaving Philadelphia students without a place to go. Parents in desperation drove across the suburban boundary lines into inner ring municipalities like Cheltenham and
Lower Merion so their children could catch the school bus and attend these schools (Bishop, 1981; Goodall, 1986). To combat these “fraudulent enrollees” many school districts, such as Lower Merion either hired private investigators or were thinking about hiring investigators to remove “illegal” students (Bishop, 1981; Woodall, 1986).

Even without the teacher strike, the stark differences between the Lower Merion and Philadelphia school districts in terms of spending, quality, and demographics signifies the devious inequities of the district boundary system. For some families, “one silly city block” is all that separates students from obtaining the educational opportunities that would increase their social and economic prospects (Klein, 1986). However, to pass Go, and enter the Lower Merion School District without the badge of residency, one must pay up. In 1986, the non-resident fee was $5,500 a year. Currently, Lower Merion School District does not permit nonresident students to attend school within the district so the district no longer accepts tuition for nonresident students (school district, 2016). If the school district did charge tuition, the cost would be $19,142.98 for elementary and $20,744.13 for secondary schools for the 2016-2017 Fiscal Year, according to the 2015-2016 Pennsylvania Department of Education Annual Financial Report (Pennsylvania Department of Education, 2017).

For most families, they cannot afford to access these schools. The LMSD sued one family in 1986 for $11,000, who moved from their home in Ardmore to Philadelphia but kept their son in the LMSD system (Klein, 1986). The father argued that he did nothing wrong, “How could I send a kid who was used to Lower Merion schools to West Philadelphia High School, where there were murders?” (Klein, 1986, p. B01). Negative perceptions of the students and schools across the street reify the need to forge up
boundaries between school districts. Lower Merion’s former director of pupil service noted,

the community feels very threatened, and are particularly feeling threatened by their proximity to the city. I don’t want to say racism. There is a very real concern about maintaining the integrity of the public-school population… The taxpayers feel very keenly they don’t want anyone here who is not a bona fide resident. (Klein, 1986, p. B01)

This non-resident problem consistently plagues Lower Merion according to a former school district interviewee. Recently, the school district just expelled two students for not living in district (Ilgenfritz, 2013).

The school board minute’s data from the 1980s and 1990s also focused on the school district’s non-resident policies (LMSD, 1981, Oct 6; 1981, Dec 7; 1988, Dec 15, LMSD; 1989, Feb 17; 1990, March 18; 1990, May 18; 1991, Jan 21). However, what is interesting is the juxtaposition of solidifying the borders from Philadelphia domestic students, compared to opening the boundaries for foreign exchange students. The minutes are full of notations of the school board waiving tuition for foreign exchange students from countries like Germany, France, New Zealand, Finland, Peru, Japan, Chile, China, Columbia, and Spain (Examples LMSD, 1987, Dec 15; 1990, Nov 19).

The current residential policy for the Lower Merion School District waives tuition in three occurrences, two of which regards foreign students who are involved in a foreign exchange program or for foreign students who have F-I immigration status (LMSD, 2005). The third occurrence triggers if the student is sponsored by A Better Chance (ABC) program or other social service agency approved by the board (LMSD, 2005). The ABC program is a national program that began in 1963 to help underprivileged US students travel to another city to attend public or private schools (McDaniel, 2001;
Kanaley, 1987). Currently, there are four ABC programs in the Philadelphia metropolitan area: Strathaven, Radnor, Swathmore, and Lower Merion. The program in Lower Merion is only for boys, and they are housed in Ardmore. In 2001, the program supported eight boys to attend Lower Merion High School (McDaniel, 2001). The impact and function of this program helps students to get into quality colleges (McDaniel, 2001). Yet the small number of participants can also serve to limit the impact of minority and low-income populations on the demographics and culture of the school district.

According to the data procured, ABC and the foreign program represent very few instances where Lower Merion has reached across the boundaries to include outside students. In 1971, like in Cheltenham School District, Lower Merion School District, Radnor School District, and the School District of Philadelphia collaborated to form The Alternative School-West High School (Goldsborough, 2010). The A School focused on providing a regional educational opportunity that crossed boundaries and promoted “socioeconomic diversity” due to a student body makeup from urban and suburban neighborhoods (Goldsborough, 2010). During the A School’s 1971-1978 tenure, about 500 students from Lower Merion attended the A School (Goldsborough, 2010).

Outside of the A School, Lower Merion has been willing to participate in programs that increase the global and national awareness and culture of its student body, but dismisses extending such access to students living in Philadelphia communities. However, Lower Merion School District has sought to reach into Philadelphia to drop off its bus fleet. In 2005, Lower Merion sought to move its 120 LMSD bus fleet to East Falls in Philadelphia, a 55% Black community adjacent to Lower Merion (US Census, 2010), to make room for the new schools (Smith, 2005; Clark, 2005). Lower Merion Township
residents have complained for years to have the fleet moved citing noise and traffic congestion. However, irked Philadelphia residents cited class and racial implications for the move (Smith, 2005). The former Lower Merion Superintendent at the time, in defense of the bus fleet move gave the district parents a letter stating, “Although some citizens would like to pigeon-hole our move as suburbia ‘dumping its problems’ on the city, the reality is that we are a stable, established and responsible property owner moving into a site that is zoned for such uses as a scrap metal processing plant, junkyard and long-haul trucking center” (Smith, 2005). This statement is chock full of classism, depicting a visual dichotomy that Lower Merion School District and its municipality as stable and established, compared to the city of Philadelphia, who have zones used for junkyards. Unlike the depiction of a junkyard, the area in East Falls, proposed for the bus fleet, was being developed for real estate, retail, and commercial growth (Smith, 2005). Philadelphians won this debate, since the bus fleet is still located in Lower Merion Township (Ilgenfritz, 2014).

Attending Lower Merion Township’s public school is recognized as a desirable option for families who want their children to have the best education and best start in life. However, for most families, especially those living in Philadelphia, accessing that type of education is akin to winning the lottery, because in truth it takes economic wealth to live in a district where such education abounds. Even though the municipalities can set up the rules to become residents, the school district can work within the confines of their power to open its boundaries to a set number of groups that probably would not undermine the taxpayers’ perception of the Main Line. Foreign exchange students and eight low-income young men from the ABC program probably fulfill acceptable notions
of diversity without rocking the boat. While at the same time, the school district can reinforce boundaries to groups that they fear or do not want.

**Conclusion**

The analysis of school district policies shows that Lower Merion School District recognizes its struggles with diverse populations and has policies in place to address and create a better relationship with its minority communities. However, the rigid nature of the Township’s housing and zoning policies already keeps out low-income and minority populations from the school district, where the quality of the school district and other services provided by these municipalities serves as a beacon for families who can afford the high cost in housing. The district helps to perpetuate such boundaries through its non-resident policies that make sure that the school district is open but only for those who can afford to live in the district or to those that fulfill its version of diversity.

LMSD’s main issue is not with outsiders but with dealing with its own definition and condition of diversity from within. LMSD compares its diversity to other Main Line school districts and not to other inner-ring Montgomery County school districts. Such comparison to the Main Line may make LMSD look diverse. Yet such a comparison glosses over its problems with providing for diverse populations, which has caused significant legal and educational battles about the opportunities of its Black and low-income populations. The school district’s active and passive policies make this district exclusive, and illusive for Black and lower-income families.
Chapter Seven

Cheltenham Township Zoning and Housing Policies:

Integration was not something the township sought, but something that was brought.

Introduction

The Philadelphia Tribune, which is one of the oldest Black newspapers in the country (See the Philadelphia Tribune, Founded, n.d), ran an advertisement from the Cheltenham Open Doors Association about the benefits of moving to Cheltenham Township. First, Cheltenham is ideally located: “One of the advantages of Cheltenham Township, a community of under 40,000 people, is its convenience” (Urban League Staff, 1969, p. 23). Cheltenham Township was the first suburb north of Philadelphia, and its public transportation system solidified Cheltenham as the “gateway” connecting the northern suburbs to the city of Philadelphia (Cheltenham Township (CT), 2005). Second, the article described Cheltenham’s housing opportunities as diverse in terms of type and affordability, paying close attention to compliment the Township’s multiple apartment complexes.

In housing facilities we have a variety of property ranging in price... Most of the houses are older but substantial and well maintained. There are few new developments and single-houses. For those people who are seeking apartments, there is a great diversity available. Lynnewood Gardens has everything from efficiency to a whole house. Lakeside is another garden type complex with apartments of every size. We also have high-rise buildings with more expensive facilities. (Urban League Staff, 1969, p. 23)

Third, the schools were highlighted as “modern” and “fine:” “We have a fine school system with well-kept buildings and small classes. Children have been accepted to every fine university from Cheltenham High School and many scholarships are available”
Finally, the article describes Cheltenham’s commercial spaces as successfully serving the interests and needs of those in the region: “As far as shopping is concerned, most of the major department stores have well-stocked branches in our area or close by… All of the food chains are represented here and there are many fine small markets which have delivery service” (Urban League Staff, 1969, p. 23).

This 1969 advertisement depicts why Cheltenham Township might have become a beacon for families of all backgrounds from Philadelphia. The geographic proximity to Philadelphia, diverse and quality housing opportunities, quality schools, and access to commercial spaces made Cheltenham marketable for families hoping to reach their suburban dream.

Even though this advertisement was printed in a Black newspaper, very little racial diversity existed in the township prior to 1980. Cheltenham in 1960 had a non-White population of 2.4% (U.S. Census, 1960). Up until 1977, the Township indicated that they were unable to predict a substantial growth of its non-White population, outside of the historical Black community in LaMott (Cheltenham Township (CT), 1977). However, by 2014 the Township and School District had a non-White population of 45% and 63.2% respectively (ACS, 2010-2014; NCES, 2013-2014).

Cheltenham Township takes pride in its diversity (Raphael, 1996). Cheltenham has one of the most diverse housing stock, renter opportunities, income ranges, and peoples of different races and religions in Montgomery County (ACS, 2010-2014). Multiple individuals interviewed for this study noted that they moved to Cheltenham because of the close proximity to Philadelphia, spacious homes, quality schools, and its
unique diversity, boasting a large Jewish community, and growing middle class Black and Korean community (Batcha, 2008; school officials 2016; township official, 2016\textsuperscript{32}). Yet this development of Cheltenham Township as a diverse suburban jurisdiction developed overtime, requiring difficult queries in the function, purpose, and transformation of their zoning, housing, and school policies in creating a demographically diverse community (CT, 2005).

**Findings Summary**

This chapter discusses the purpose, application, and impact of zoning and housing policies that eventually transformed Cheltenham from an all White community to the most diverse community in age, race, and income in Montgomery County\textsuperscript{33} (See US Census, 1960; ACS, 2010-2014).

First, an analysis of the Township’s zoning policies from 1960 until present day suggests that Cheltenham Township did not create effective economic or physical buffers to divide Cheltenham and a demographically changing Philadelphia space (CT, 1969; 1977; 2005). The racial transformation of Philadelphia tracts surrounding Cheltenham, led to racial transformations into Cheltenham neighborhoods in the 1980’s, specifically along Cheltenham Avenue (US Census 1980-2010; ACS, 2010-2014).

The data also shows that demographic transformations stayed relegated to Cheltenham because zoning decisions such as the development of affordable commercial and major multifamily complexes dotted the Cheltenham Avenue corridor (Montgomery

\textsuperscript{32} Four out of the six Cheltenham interviewees noted Cheltenham’s diversity in housing and in population as reasons for their move to the Township.

\textsuperscript{33} Chapter Eight will address school policies of Cheltenham School District.
County Planning Commission (MC), 2012). These multifamily and commercial spaces served both Cheltenham and Philadelphia neighborhoods interchangeably, allowing Philadelphians to easily cross the street for their needs (MC, 2012). The failure to create more commercial spaces or even high-end commercial spaces in other parts of the Township due to the desire to keep Cheltenham residential caused residents to pay higher school and municipal taxes than the rest of the municipalities in Montgomery County (Goldstein, 1992; Rubin, 1991; MC, 2015). The high taxes have been a thorn in the side of Cheltenham, and have been utilized to criticize the overall quality of the Township and steer potential residents away (CT policy official, 2016). In addition, Cheltenham’s deep historical racial diversity that developed along the Cheltenham Avenue line in LaMott allowed Cheltenham to become accessible and tangible to minority populations in Philadelphia (CT, 2005).

Second, the housing policy analysis from 1960 until present day proves that Cheltenham Township’s housing opportunities are vast and create access points for diverse populations with different incomes (US Census, 1960-2010; ACS, 2010-2014). Cheltenham Township is known for providing spacious, quality housing at a reasonable cost in comparison to other municipalities in Montgomery County (US Census, 1960-2010; ACS, 2010-2014). Cheltenham Township’s housing policy does limit the flow of low-income populations access to the Township, but the Township’s vast multifamily housing and rental opportunities provides housing for low-to- moderate-income and minority populations (CT, 1969, 1977, 2005).

Finally, interwoven in the Township’s zoning and housing policy analysis is a discussion of the relationship between Cheltenham and Philadelphia. The period between
Cheltenham’s founding in 1682 until present day shows Cheltenham Township struggling with being geographically, culturally, demographically, economically, and politically tethered to the Philadelphia nexus. Furthermore, this chapter also discusses the relationship between municipality officials, school district leaders, and residents in the process of constructing and eroding boundary lines between Cheltenham and Philadelphia. This analysis of the zoning and housing policy, as well as the parties involved in such decisions shows that Cheltenham did not necessarily intend for such demographic changes to take place and struggles in its increasing diversification; yet have adopted their diverse condition as part of their suburban identity.

**Zoning Policy**

The analysis of Cheltenham’s zoning policy prior to 1980 suggests that the Township did not create effective economic or physical buffers to prevent racial and economic transformations stemming from a demographically changing Philadelphia area. This section will first address the geographic relationship between Cheltenham with Philadelphia and assess how the demographics of the adjacent Philadelphia tracts along Cheltenham Avenue contributed to Cheltenham’s diversification. Second, this analysis will then address the specific zoning policies that constructed permissible boundaries between Philadelphia and Cheltenham neighborhoods.

**Philadelphia Tracts Racial and Economic Transitions Effects Cheltenham’s Demographics**

A writer in the Philadelphia Inquirer about inner ring suburbs argued that “all suburbs feel the gravitational pull of the city; those in the tightest orbit feel it strongest” (Goldstein, 1992). This quote is specifically true for Cheltenham Township. The fate of
the Township’s demographic trajectory is closely intertwined with its Philadelphia neighbors. Therefore, as Philadelphia changes so does Cheltenham. To assess these changes, it is essential to understand the geographic boundaries of Cheltenham Township, and the racial and economic demographics of Cheltenham and its Philadelphia neighbors.

**Geographic boundaries of Cheltenham Township.** Cheltenham Township is an inner ring suburb of northwest Philadelphia representing the following neighborhoods: Melrose Park, LaMott, Lynnewood Gardens, Laverock, Edge Hill, Glenside, Wyncote, Chelten Hills, Elkins Park, and Cheltenham Village (See Figure 7-1). The following Montgomery County suburban communities surround Cheltenham Township: Springfield Township, Jenkintown Borough, Abington Township, and Upper Dublin Township (See Figure 3-2 in Chapter Three).

Cheltenham Township shares three borders with Philadelphia. First, Tookany Creek Parkway, located along the eastern border, divides the Township from the Philadelphia neighborhood of Lawncrest. Second, Cheltenham Village in the northeast quadrant of the Township shares a small corner of Cottman Avenue with the Philadelphia community of Fox Chase. Yet it is the ten mile, sixty-foot-wide Cheltenham Avenue that extends through the entire southern portion of the township that serves both as a physical and cultural dividing boundary line of the Philadelphia residential neighborhoods of Cedarbrook, West Oak Lane, East Oak Lane, and Olney; and the Cheltenham neighborhoods of Laverock, Lynnewood Gardens, LaMott, and Melrose Park (See Figure 7-1).
Figure 7-1: Cheltenham Township census tracts and neighborhoods

![Cheltenham Township Census Tracts](image)

Source: CT, 2005.
Note: The dashed black line on the southern part of Cheltenham Township is Cheltenham Avenue. The black arrow line in the north of Cheltenham Village is Cottman Avenue. The blue line on the eastern part of the Township is Tookany Creek. These lines are supposed to represent the boundaries between Cheltenham Township and Philadelphia.

Demographic divisions between Cheltenham and Philadelphia. Compared to Philadelphia, Cheltenham is an affluent municipality. According to Table 7-1 the income gap between Cheltenham and Philadelphia is widening. Yet Cheltenham Township’s poverty rate has fluctuated, and grown slightly over the decade from 5.1% in 1980 to 8.1% in 2010; while Philadelphia’s poverty rate has grown from 20% to 27% (Table 7-1).

Figure 7-2 offers a more pronounced analysis of the economic differences between Cheltenham Township neighborhoods and the adjacent Philadelphia neighborhoods from 1980 until 2014. Figure 7-2 shows that except for Lynnewood Gardens, for the most part, Cheltenham neighborhoods are more affluent than the surrounding Philadelphia tracts. Lynnewood Gardens, a 100% renter neighborhood, is apparently on par or poorer than most of the adjacent Philadelphia neighborhoods.

Outside of the income comparisons between Philadelphia and Cheltenham, these adjacent
Philadelphia neighborhoods reflect a slightly higher MHI than Philadelphia’s overall MHI of $36,521 (US Census 2010).

More concerning is the gap between Cheltenham School District and the School District of Philadelphia’s (SDP) Free and Reduced Priced Lunch (FRPL) percentages. Philadelphia’s FRPL has grown from an already high 68.6% to 83.3% within the past 14 years. Compared to Cheltenham’s 23.7% of FRPL population, this gap is significant. However, the growth of CSD’s FRPL percentages from 4.6% to 23.7% within 14 years only signifies the influx of low-income student populations to the district.

Table 7-1: Cheltenham Township and Philadelphia Median Household Income (1980-2014)

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</tr>
</thead>
<tbody>
<tr>
<td>Cheltenham Township</td>
<td>$25,048</td>
<td>$47,049</td>
<td>$61,713</td>
<td>$71,516</td>
<td>$75,831</td>
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<td>$165,000</td>
<td>$293,000</td>
<td>$276,000</td>
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<td>Housing Cost</td>
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<td>3.7%</td>
<td>5.1%</td>
<td>8.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Poverty %</td>
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<td>N/A</td>
<td>4.6%</td>
<td>14.3%</td>
<td>23.7%</td>
</tr>
<tr>
<td>CSD FRPL</td>
<td>N/A</td>
<td>N/A</td>
<td>5.1%</td>
<td>8.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Philadelphia County (City)</td>
<td>$13,169</td>
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<td>$30,746</td>
<td>$36,251</td>
<td>$37,460</td>
</tr>
<tr>
<td>MHI</td>
<td>N/A</td>
<td>$49,400</td>
<td>$61,000</td>
<td>$135,200</td>
<td>$143,200</td>
</tr>
<tr>
<td>Housing Cost</td>
<td>20.6%</td>
<td>20.3%</td>
<td>22.9%</td>
<td>N/A</td>
<td>26.7%</td>
</tr>
<tr>
<td>Poverty %</td>
<td>N/A</td>
<td>N/A</td>
<td>68.6%</td>
<td>77%</td>
<td>83.3%</td>
</tr>
<tr>
<td>SDP FRPL</td>
<td>N/A</td>
<td>N/A</td>
<td>5.1%</td>
<td>8.1%</td>
<td>8.4%</td>
</tr>
</tbody>
</table>

Note: The Median Household Income was not available in the 1960 and 1970 Census. The NCES data only has Free and Reduced Price Lunch percentages between 2000-2014.
Figure 7-2: Cheltenham surrounding Philadelphia Census Tracts Median Household Income (1980-2014)

Source: Social Explorer; US Census 1980-2010; ACS, 2010-2014
Note: The thin white line divides Montgomery County from Philadelphia County. The thick white line reflects Cheltenham Township’s borders.
Philadelphia’s impact on the racial demographics of Cheltenham proved even more significant. Table 7-2 shows extreme racial transitions in both Cheltenham and Philadelphia. Albeit Philadelphia proved to have a greater racial diversity than Cheltenham, but by 1980 Cheltenham began to significantly diversify specifically in regard to the influx of Black and to smaller extent Asian populations to the Township.

By 2014, 58.4% of Philadelphia’s population is non-White. Cheltenham is close behind, with a non-White population of 45%. The depiction of suburban communities as homogeneous White spaces is obliterated by the racial transformation of Cheltenham Township. Cheltenham and Philadelphia are no longer majority White spaces. It seems as if Cheltenham and Philadelphia’s racial demographics are converging.

**Table 7-2: Cheltenham Township and Philadelphia racial demography (1960-2014).**

<table>
<thead>
<tr>
<th>Year</th>
<th>Municipality</th>
<th>White</th>
<th>Black</th>
<th>Asian</th>
<th>Hispanic</th>
<th>Non-White</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>CT</td>
<td>97.6%</td>
<td>2.3%</td>
<td>0.09%</td>
<td>N/A</td>
<td>2.4%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>73.3%</td>
<td>26.4%</td>
<td>N/A</td>
<td>N/A</td>
<td>26.7%</td>
</tr>
<tr>
<td>1970</td>
<td>CT</td>
<td>97.7%</td>
<td>1.9%</td>
<td>N/A</td>
<td>N/A</td>
<td>2.3%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>65.8%</td>
<td>33.6%</td>
<td>N/A</td>
<td>1.4%</td>
<td>34.2%</td>
</tr>
<tr>
<td>1980</td>
<td>CT</td>
<td>90.5%</td>
<td>7%</td>
<td>2.3%</td>
<td>0.8%</td>
<td>9.5%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>58.2%</td>
<td>37.8%</td>
<td>1.1%</td>
<td>3.8%</td>
<td>41.8%</td>
</tr>
<tr>
<td>1990</td>
<td>CT</td>
<td>79.4%</td>
<td>15.1%</td>
<td>5%</td>
<td>0.8%</td>
<td>20.6%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>53.5%</td>
<td>39.9%</td>
<td>2.7%</td>
<td>5.6%</td>
<td>46.4%</td>
</tr>
<tr>
<td>2000</td>
<td>CT</td>
<td>66.4%</td>
<td>24.6%</td>
<td>6.4%</td>
<td>2%</td>
<td>33.6%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>45%</td>
<td>43.2%</td>
<td>4.5%</td>
<td>8.5%</td>
<td>55%</td>
</tr>
<tr>
<td>2010</td>
<td>CT</td>
<td>57.4%</td>
<td>31%</td>
<td>7.7%</td>
<td>3.9%</td>
<td>42.6%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>41%</td>
<td>43.4%</td>
<td>6.3%</td>
<td>12.3%</td>
<td>59%</td>
</tr>
<tr>
<td>2014</td>
<td>CT</td>
<td>55%</td>
<td>33.3%</td>
<td>7.6%</td>
<td>4.8%</td>
<td>45%</td>
</tr>
<tr>
<td></td>
<td>Philadelphia</td>
<td>41.6%</td>
<td>43%</td>
<td>6.7%</td>
<td>13%</td>
<td>58.4%</td>
</tr>
</tbody>
</table>

Source: US Census 1960-2010; ACS 2010-2014

For a closer analysis of Cheltenham’s racial transition, Figure 7-3 pictorially depicts the racial transformations by decade of the adjacent Philadelphia neighborhoods and Cheltenham Township neighborhoods. According to Table 2, in 1960 and 1970 the Black, non-White population stayed at 2.4% and 2.3% respectively. The historical Black
community of LaMott provided the only real diversity\textsuperscript{34} in the Township (US Census, 1960, 1970). The racial demographics in the adjacent Philadelphia spaces were also overwhelmingly White in 1960 and 1970 (See Figure 7-3).

Yet racial changes with the Black and Asian populations in the 1970s in Philadelphia coincided with racial demographic changes in the adjacent Cheltenham neighborhoods by 1980. By 1980, the adjacent Philadelphia spaces along Cheltenham Avenue such as Cedarbrook, West Oak Lane, and East Oak Lane became nearly 100% Black, with such populations flowing into the southern Cheltenham neighborhoods of Lynnewood Gardens, LaMott, Laverock, and Melrose Park (US Census, 1980-2010). Today, even though the non-White populations have spread throughout the northern Cheltenham tracts, Black and Asian populations are primarily concentrated along the Cheltenham Avenue corridor (Figure 7-3). Other adjacent Philadelphia communities along Cottman Avenue and Tookany Creek only recently have gone through slight racial demographic changes and have stayed relatively White until 2000 (Figure 7-3).

\textsuperscript{34} LaMott was 10% Black in 1960 and 1970.
Figure 7-3: Cheltenham Township and surrounding Philadelphia census tracts White percentage

Source: Social Explorer; US Census 1960-2010
Analyzing the geographic space and demographics of Cheltenham Township and Philadelphia suggests a few key points. First, Cheltenham Township has maintained its overall affluence over Philadelphia communities, however, the data also show that there are Cheltenham neighborhoods, such as Lynnewood Gardens, which mirror or are poorer than adjacent Philadelphia communities. The rising poverty rate and FRPL percentage also signifies that lower-income communities are accessing the Township. Finally, Cheltenham Township’s racial transformation is directly linked to Philadelphia’s racial transformation, specifically along Cheltenham Avenue.

**Cheltenham Township Constructed Permissible Boundaries Along Cheltenham Avenue Contributing to the Diversification of the Township**

Demographic shifts in Cheltenham Township is inextricably linked to the racial and socioeconomic populations across the street. The demographics shifts surrounding Cheltenham Avenue explains what happened, but not how and why such changes took place. To further assess the role that Cheltenham Avenue plays as a passageway between
jurisdictions requires a discussion on Cheltenham Avenue, the history of the Township, key zoning decisions from 1960 until 1980, and the cultural and political relationship between Philadelphia and Cheltenham neighborhoods.

**Cheltenham Avenue divides residential communities.** Cheltenham Avenue essentially functions as a major connection to suburban and urban communities throughout Pennsylvania. The Cheltenham Avenue is a four-lane road that bisects Philadelphia and two suburban municipalities, Springfield Township and Cheltenham Township. Traffic is challenging during rush hour, as motorists attempt to get on the 309 interchange with connections to the Pennsylvania Turnpike or to Tookany Creek Parkway leading to the major Philadelphia artery of Roosevelt Boulevard or US Route 1. Despite the traffic, Cheltenham Avenue is extremely traversable.

On the Cheltenham side closer to Tookany Creek are detached single-family homes and a shopping center that includes a grocery school, CVS, Wine and Spirits, nailery, a dentist office, and dry cleaners. Across the street are attached single-family homes. Further along Cheltenham Avenue are a range of Korean businesses, residential neighborhoods full of single-family homes, apartment complexes, and churches on both sides of the street. Halfway down, on the Cheltenham side is the largest multifamily complex in the Township, Lynnewood Gardens, and right next door is the Cheltenham Mall. The Cheltenham Mall also contains a Target, a grocery store, and the Burlington Coat Factory, plus a number of fast food enterprises. On the Philadelphia side are single-family attached housing with a smattering of gas stations and shops. Pushing down the street is the Cedarbrook Shopping Center, which contains a WalMart and single-family
attached housing in Philadelphia. Near the end of the Cheltenham Avenue’s domain in Cheltenham Township are single-family communities on both sides of the street.

This description of Cheltenham Avenue shows that this street divides two predominately residential communities, with commercial options interspersed between residential spaces.

**Development of a suburb.** Since the Township’s founding by English Quakers in 1682, the close proximity of Cheltenham Township to the City of Philadelphia, the advent of the railroad in 1850, and the industrialization of Tookany Creek advanced Cheltenham’s physical, economic, and cultural identity from an agrarian community to the City of Philadelphia’s “gateway” to the northern suburbs (CT, 2005; Goldstein, 1992; Jones, 1940). This suburban progression helped Cheltenham to develop neighborhoods teeming with culturally rich histories and peoples, such as the wealthy, ethnic White working classes, and a historical Black community in LaMott (CT, 2005).

By the 1920s, a new zoning ordinance in 1929, the roadway system and the breakup of the large estates had created Cheltenham’s suburban framework (CT, 2005). After World War II, Cheltenham experienced an extreme population surge for the next two decades. From 1950 until 1960, the Township grew by 57.5%, hitting its apex of 40,238 residents and school district enrollment apex of 6,866 by 1970 (*See* Table 7-3).

To handle the influx, the Township developed approximately 50% of its total housing units between 1950 and 1970 (U.S. Census, 1980). The Township established commercial developments such as the Cheltenham Shopping Mall and Cedarbrook Shopping Center in the 1960s located on Cheltenham Avenue (CT, 2005). The school
district embarked on a massive school revitalization plan and built multiple schools in the
three decades after WWII (Scott, 1983).

During the 1970s, the population started to decline. The school district lost 36% of its enrollment, requiring the school district to close four schools (Scott, 1983; (See Table 7-3). However, despite the loss in the student population the over 45 population increased by 45% from 1950 to 1980 (CT, 1977; Figure 7-4). By 1970, 98% of Cheltenham’s land was developed (CT, 1977). With little space to develop and occupy housing, young families were not moving to the Township at the same rate as before (CT, 1977).

**Table 7-3**: Cheltenham Township population changes (1950-2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1950</td>
<td>22,854</td>
<td>N/A</td>
</tr>
<tr>
<td>1960</td>
<td>35,990</td>
<td>6,439</td>
</tr>
<tr>
<td>1970</td>
<td>40,238</td>
<td>6,866</td>
</tr>
<tr>
<td>1980</td>
<td>35,509</td>
<td>4,366</td>
</tr>
<tr>
<td>1990</td>
<td>34,923</td>
<td>4,023</td>
</tr>
<tr>
<td>2000</td>
<td>36,875</td>
<td>5,089</td>
</tr>
<tr>
<td>2010</td>
<td>36,793</td>
<td>4,386</td>
</tr>
<tr>
<td>2014</td>
<td>36,912</td>
<td>4,561</td>
</tr>
</tbody>
</table>

**Figure 7-4**: Cheltenham Township age distribution percentage (1960-2010)

Source: US Census 1960-2010
Zoning decisions contributed to the growth of a diverse community.
Understanding the historical development and major population shifts regarding the growth and age of the Township residents are essential, because these shifts set the stage for major zoning and housing decisions prior to 1980 that contributed to the current income and racial transformations in Cheltenham. An analysis of the zoning policy elicits further discussion regarding the placement of commercial properties, multifamily complexes, and the historical Black community of LaMott along Cheltenham Avenue.

Limiting and confining commercial properties. Cheltenham Township desired to keep the space residential, only developing major regional commercial spaces along the Cheltenham Avenue boundary line such as the Cheltenham and Cedarbrook Mall (MC, 2012). Most of the residential communities along Cheltenham Avenue were zoned for mixed-use purposes, which confined the spread of commercial spaces along that Cheltenham Avenue boundary line (CT, 1969, 2005). By confining the spread of commercial spaces these spaces served a regional purpose and allowed for constant foot traffic of Philadelphians to Cheltenham’s residential and commercial spaces (MC, 2012).

Cheltenham Avenue businesses, specifically the Cheltenham Mall, are recognized as “urban” and part of the city (local official, 2016). The mall itself has had a Philadelphia zip code since the 1960s even though it’s located in Cheltenham (local official, 2016). Unlike Lower Merion Township’s City Ave, which was developed by Philadelphia and Lower Merion Township to be a major high-end commercial district,

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35 In the 1960s, the Wyncote Postmaster without asking Cheltenham wanted to shorten its route, and went to the Philadelphia officials to get the Philadelphia postal service to take Cheltenham Mall. Cheltenham Township has been working to change it back to a Cheltenham/Wyncote zip code for four decades (local official, 2016).
Cheltenham Avenue was developed as a primarily residential district with a smattering of commercial enterprises (CT, 1969, 1977, 2005; See Chapter Five and Six).

This preference to keep Cheltenham residential and to confine commercial spaces predominately on Cheltenham Avenue proved to have real racial and economic consequences. In 1980, the Township had an opportunity for the Willow Grove Mall to come to Cheltenham Township. The mall was supposed to be a high boutique mall with high-end stores like Saks 5th Avenue, but the residents torpedoed the plan because they wanted to prevent the foot and car traffic that such an enterprise would create within the Township (Interviewee, 2016). The Willow Grove Mall ended up moving to Upper Merion and Abington Township (Willow Grove, n.d.). An interviewee argued, “with the opportunities to make money for the Township we struggled. We had such a high population of taxpayers who could afford to live here. They did not want to expand the types of population by creating more commercial spaces” (2016). The implication of this statement alluded that residents did not want certain Black Philadelphians traversing in and out of the Cheltenham Avenue communities.

From 1980, commercial spaces such as the Cheltenham Mall became analogous with crime. Concerns about crossover crime and fear of the other from the city consumed a portion of the conversation in the newspapers of the time (White, 1977; Shaw, 1985b; Goldstein, 1992). In 1976, Dr. Mitchell, a professor from the Wharton Business School at the University of Pennsylvania prepared a report for the Eastern Montgomery Advisory Council of the Pennsylvanian Human Relations Commission to discuss the human relations “deterioration” along the Cheltenham-West Oak Lane corridor (White, 1977).

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36 In the 1980s the Cheltenham Mall changed ownership. In the 1960s and 1970s, the mall was an outdoor shopping center owned by the Gimbel Brothers. Once Gimbels went under and folded in 1980, the new owner carved it up to serve as indoor multiple retail space.
The Mitchell Report in summary found that Cheltenham residents were “fearful” of the “radical population shift across Cheltenham Avenue,” of “Black immigrants” traversing in and out of Cheltenham borders, and the criminal acts perpetrated by Black youth threatening the commercial spaces and the residential peace of the majority White Cheltenham neighborhoods (White, 1977).

In a 1977 Philadelphia Tribune article, Cheltenham Township officials and leaders blamed the loss of tenants in the Mall and decreasing business ventures on the “undereducated and underemployed Black youth from West Oak Lane [Philadelphia]” (White, 1977, p. 2). In another article, one LaMott resident was quoted saying that Cheltenham is “increasingly dangerous place threatened by lost souls from Philadelphia” (Goldstein, 1992). Another resident stated that crime has increased since the Cheltenham Mall opened, “I’m more concerned than ever that Philadelphia is across the road” (Goldstein, 1992). This assertion that Philadelphia is dangerous was predicated by reports that the majority of those arrested in Cheltenham were Philadelphia residents. For example, in 1990, Cheltenham police made 1,472 arrests where 1,000 were identified as Philadelphia residents (Goldstein, 1992). The former township manager, who grew up in Glenside argued, “if we could move the border [with Philadelphia] one or two miles away, we wouldn’t need an 80-person police department” (quoted in Goldstein, 1992).

Decisions to confine commercial spaces along Cheltenham Avenue was seen to block or bifurcate, although for short period, the trajectory of Black Philadelphians from accessing the northern neighborhoods of the Township (See Goldstein, 1992). But, such decisions only created accessible entry points for minority and lower-income communities to shop, congregate, or even reside in the southern part of the Township.
Currently, Cheltenham and Philadelphia residents are in conflict with developers to keep out fast food chains within and outside of the Cheltenham Mall to keep the area and property values from deteriorating (Edmonds, 2000).

Yet without commercial properties and industry to enrich the coffers of the Township, the Township and the school district raises property and school taxes every year to maintain the services and opportunities found within its borders, where the burden falls on the residents (Goldstein, 1992; Rubin, 1991; MCPC, 2015). Due to the age of the Township, it must support extreme infrastructure issues such as failing sewers as well as 14 municipality buildings (Goldstien, 1992; local officials 2016; McCrone, 2016). High taxes have deterred young families from moving to the Township.\footnote{Montgomery County municipalities have raised money through wage taxes. However, Cheltenham has been unwilling to utilize such tactics to raise money due to the Sterling Act. The Sterling Act (1932) allows the city of Philadelphia to collect taxes from those that work in the city. In 1980, approximately 60% of Cheltenham Township residents worked in Philadelphia (Rubin, 1991). Because the city of Philadelphia already taxes wages, inner ring suburban communities like Cheltenham will not go after the wages of its residents. The Township felt that it would be unfair to tax the 40% of the residents for services provided to everyone (Rubin, 1991).} Real estate agents have labeled Cheltenham as a “dying community” steering potential residents out of the community due to such high taxes (local official, 2016).

\textit{Zoning multifamily housing.} The Township has one of the most diverse housing types and the largest renter population among the inner ring suburbs of its size in Montgomery County (MC, 2015). Approximately 38.3\% of the housing in Cheltenham are multifamily units (2 or more units) (ACS, 2010-2014; See Table 7-4). Moreover, about 37\% of the residents are renters, 10\% greater than the renter percentage in Montgomery County (ACS, 2010-2014). The advent of multifamily complexes along Cheltenham Avenue would not only dramatically change the individual Cheltenham
neighborhoods but also help bring forth the demographic and cultural transformation of the entire Township.

In the 1960s, Cheltenham Township embarked on high-density multifamily housing development campaign to provide for the overall rise in population. Multifamily housing swelled from 27% in 1960 to approximately 37% by 1970 (Table 7-4). The renter percentage followed suit, growing from 29% to approximately 38% by 1970 (Table 7-5). These percentages would stay relatively constant throughout the decades.

**Table 7-4: Cheltenham Township housing units (1960 to 2014)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Single Family Detached/Attached</th>
<th>2-9 Units</th>
<th>10 or more Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>73.4%</td>
<td>20.2%</td>
<td>6.4%</td>
</tr>
<tr>
<td>1970</td>
<td>63.3%</td>
<td>11.8%</td>
<td>24.9%</td>
</tr>
<tr>
<td>1980</td>
<td>62.1%</td>
<td>37.8%</td>
<td></td>
</tr>
<tr>
<td>1990</td>
<td>63.8%</td>
<td>11.9%</td>
<td>23.1%</td>
</tr>
<tr>
<td>2000</td>
<td>63%</td>
<td>13.8%</td>
<td>20.7%</td>
</tr>
<tr>
<td>2010</td>
<td>61.5%</td>
<td>15.1%</td>
<td>23.3%</td>
</tr>
<tr>
<td>2014</td>
<td>61.6%</td>
<td>17.2%</td>
<td>21.1%</td>
</tr>
</tbody>
</table>

U.S. Census 1960-2010; American Community Survey 2014
Note: The 1980 Census only includes housing units’ data from 2-4, and 5 or more units.

**Table 7-5: Cheltenham Township Housing Occupancy, Tenure, and Cost** (1960 to 2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>Housing Units</th>
<th>Occupation %</th>
<th>Owner Occupied %</th>
<th>Renter Occupied %</th>
<th>Median Housing Value</th>
<th>Median Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>11,324</td>
<td>97.9%</td>
<td>70.7%</td>
<td>29.3%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>1970</td>
<td>13,991</td>
<td>97.6%</td>
<td>62.3%</td>
<td>37.7%</td>
<td>N/A</td>
<td>$185</td>
</tr>
<tr>
<td>1980</td>
<td>14,257</td>
<td>93.8%</td>
<td>65.5%</td>
<td>34.5%</td>
<td>N/A</td>
<td>$291</td>
</tr>
<tr>
<td>1990</td>
<td>14,459</td>
<td>95.1%</td>
<td>67.6%</td>
<td>32.4%</td>
<td>$160,000</td>
<td>$523</td>
</tr>
<tr>
<td>2000</td>
<td>14,897</td>
<td>96.3%</td>
<td>64.5%</td>
<td>35.5%</td>
<td>$165,000</td>
<td>$742</td>
</tr>
<tr>
<td>2010</td>
<td>16,243</td>
<td>92.6%</td>
<td>66.4%</td>
<td>33.6%</td>
<td>$293,000</td>
<td>$965</td>
</tr>
<tr>
<td>2014</td>
<td>15,313</td>
<td>93.3%</td>
<td>62.5%</td>
<td>37.4%</td>
<td>$276,000</td>
<td>$1,084</td>
</tr>
</tbody>
</table>

U.S. Census 1960-2010; American Community Survey 2014

These percentages are even more significant, examining the individual housing tenure and occupancy of the census tracts in Cheltenham Township. Lynnewood Gardens was

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38 The cost of the housing will be discussed further in the Housing section of the Chapter.
built in 1948, which is an over 3000, 100% renter population tract. In East Elkins Park and Cheltenham Village, Chelten Hills, Wyncote, Glenside, and Edge Hill tracts, the percentage of renters doubled, which can be attributed to the construction of multiunit complexes in these spaces (US Census, 1960-1970). However, the biggest multifamily project took place in Laverock. In 1960, Laverock only had 780 units with a renter percentage of 2.1%, but in 1970, after the construction of Cedarbrook Hills Apartment, the number of units grew to 2,359, with a renter percentage of 58.8% (US Census 1960, 1970).

Once the population started to decline and age in the 1970s, the Township continued to build and use multifamily housing to allow older residents to downsize both in cost and size to stay in the district. These Cheltenham Avenue multifamily housing opportunities like Lynnewood Gardens initially supported Cheltenham’s lower-income White elderly population in 1970. Once the Philadelphia tracts diversified, spaces like Lynnewood Gardens began to support a younger, lower-income, Black and Asian population; while apartment complexes in Laverock began to support mid-to upper income Black professional population (US Census, 1980-2010; ACS, 2010-2014).

Cheltenham’s array of multifamily opportunities, specifically the complexes along Cheltenham Avenue would become residential destinations for minority populations. I will further discuss the importance of such housing decisions in the Housing section of this chapter.

**Defining diversity.** Cheltenham Township can also attribute its demographic transformation to its rich history with diverse communities. A Township policy official asserts that Cheltenham has always been diverse. He called Cheltenham “a community of
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outcasts” (2016). In the 1850s, the newly wealthy Philadelphians who moved to Cheltenham Township were initially pushed out of the Main Line (See Chapter 5 and 6) because they did not fit into the older Main Line aristocracy (local official 2016). These newly minted entrepreneurs had a different mindset, more likely to accept diverse populations (local official, 2016). Whether this statement proved true or an exaggeration to justify Cheltenham’s current diversity identity, Township documents also sought to substantiate Cheltenham’s recognition of diverse populations.

For example, in Jones’ 1940 book on the history of Cheltenham and the various Cheltenham Township comprehensive plans, each emphasized Cheltenham’s Quaker roots, specifically in regard to the Township’s social acceptance of Black populations. Jones’ (1940) study emphasized that in 1688, the Germantown Society of Friends drew up America’s first document against slavery that was distributed to the Society of Friends in Cheltenham. Richard Morrey, a Township resident, was one of the first Americans to emancipate and allocate land to his slaves (CT, 2005). This land was one of the first Black settlements in the country, and it was called Guineatown in recognition of their origin from Guinea (CT, 2005, p. 50).

Cheltenham was also touted as a refuge to marginalized religious groups and White ethnic groups such as the Jews, Italians, and Irish (Goldstein, 1992). The Jews migrated from North Philadelphia after WWI, in the 1930s and again in the 1970s. By 1980, Cheltenham was 35% Jewish (Goldstein, 1992).

However, it is the development of LaMott, a historical Black community developed along Cheltenham Avenue that has proven to be influential to Cheltenham’s diverse cultural identity (Scott, 1999). The neighborhood of LaMott was established with
an abolitionist focus and was named after Lucretia Mott, a suffragette, abolitionist, and Quaker minister (CT, 2005)

Developed along Cheltenham Avenue, LaMott was a key station for the Underground Railroad (CT, 2005; McDonald, 2001). Formerly known as Camptown, Edward M. Davis, Lucretia Mott’s son-in-law donated this tract of land, Camp William Penn, to be used to train Black soldiers for the Union during the Civil War. After the war, White working-class families, such as the Irish, and Black families purchased lots in the area. LaMott became one of the first racially integrated suburban communities in the country (CT, 2005; Scott, 1999). LaMott’s location created a window of opportunity where low-to-middle class Black communities from Philadelphia could access.

Despite the geographic and cultural perception of a welcoming diverse community, racism and anti-Semitism proliferated in the Township (Goldstein, 1992). At the center of these struggles was Cheltenham’s constant battle to differentiate itself from its Philadelphia neighbor (CT, 1977). As discussed, Cheltenham did not create effective physical buffers keeping Philadelphians out of Cheltenham. However, for most of the suburb’s history, Cheltenham Avenue operated as a cultural blockade. The demarcation line separating Philadelphia and Cheltenham was fundamentally defined by Cheltenham’s ability to maintain the historical, affluent, and quiet residential communities; the promise of quality housing and school district; and provided a space for White residents to escape the diversifying demographics of bordering Philadelphia neighborhoods (school official, 2016).

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39 Davis continued to invest in the area, and built a school, which now serves as the LaMott Community Center, and donated land for the LaMott African Methodist Episcopal church in 1888. William A. Ritchie founded the LaMott Building and Loan Association and helped Black home and business owners in the area (CT, 2005; McDonald, 2005).
For most of its history, Cheltenham differed from Philadelphia in its wealth and White majority. The Township attributed its high-quality housing stock to the high median income and value of the homes and apartments. The 1977 comprehensive plan propagated, “The Township was conceived in wealth, and has been regarded as a residential community for upper income groups. It maintains this distinction to the present day” (p. 28). The plan went on to describe the deterioration of the housing structures in Philadelphia, juxtaposed to the high standards and quality in the Township. The Township noted, “Nearly 60% of the 1970 family population earned more than $15,000. This enabled most residents of the Township to afford the high quality and soundly constructed housing” (CT, 1977, p.29). In 1970, only 18.2% of the family population in Philadelphia earned more than $15,000 (U.S. Census, 1970). The plan made clear that the limited availability and high prices of developable land maintained an exclusionary boundary structure (CT, 1977). The income differences between Philadelphia and Cheltenham kept out populations who could not afford to buy into the community.

In the 1969 and the 1977 comprehensive plan, the municipality barely touched on the racial demographics in the Township because they initially had very little racial diversity to plan for. The 1977 Comprehensive plan noted:

U.S. Bureau of Census reported that for the first time in American history, median income for all non-[W]hite couples, both of whom were working, was equal to the median income for [W]hite working couples. In simpler terms, this development means that a selected segment of the non-[W]hite population is now in a financial position to afford higher priced suburban homes. It is still too early to trace whether this national development has produced any noticeable migration from urban areas to suburban areas, much less whether the national implications hold true for the Philadelphia SMSA (Standard Metropolitan Statistical Area). At the very least, it suggests that movement is possible. (CT, 1977, p. 26)
Cheltenham Township truly believed that their boundaries were formidable, due to Cheltenham’s perceived affluence. In fact, the Township made pains to suggest that young families and couples probably could not yet afford the rent in the newly constructed rental properties, even though some of the older apartment complexes were utilized for lower-income elderly populations (CT, 1977). Therefore, suggesting if most White families could not afford to access the district, then minorities, specifically Black families were definitely disadvantaged. Minority families perceived as not being able to afford the housing in Cheltenham was used to explain their small percentages in the Township. What was not discussed or considered was the ways in which discriminatory housing policies and racism denied Black families access to housing and opportunities in the Township.40

One historian from the Old York Road Historian Society noted that in LaMott, Black families lived in segregated spaces. Furthermore, Blacks were initially confined in LaMott and struggled to move to other parts of the Township in the 1950s and 60s. For example, in 1956 a Black pastor showed interest in 32 homes in Elkins Park but was rebuffed 32 times. He was only able to buy a home in Elkins Park after intervention of Whites from an Abington Friends Meeting (Goldstein, 1992). Another story tells of how football legend and son of LaMott, Wally Trippelett was discouraged from applying to

40 The comprehensive plans never addressed the impact of federal housing policies such as the Fair Housing Act of 1968 on the migration of minority families to the suburbs. Discriminatory housing federal, state, and local policies made it almost impossible for minority families to access suburban spaces, even if they did have the same income as Whites (Freund, 2007). For example, in a 1969 article in the Philadelphia Tribune, a Black couple was blocked from moving to a Chester apartment complex in Delaware County (a suburban county outside of Philadelphia). The apartment complex argued that the couple did not meet the financial requirements, even though the couple made more than the rent money each week. The Commission on Human Relations found probable cause that the young couple was barred from the apartment building due to their race (Haynes, 1969).
coach and teach at Cheltenham High School in 1949 because he was Black.\textsuperscript{41} Cheltenham hired its first Black teacher a full 10 years later (Flashback, 1999).

Such racial bias became an important motivator for White families to move from the central city to the suburbs, specifically to escape the racial demographic shifts in Philadelphia in the 1960s and 1970s (school official, 2017). A White school official noted that his in-laws moved to Cheltenham to avoid the migration of minority communities in Philadelphia during those early decades (2016). While Cheltenham stood as a monolith of White affluence, the Philadelphia neighborhoods across the street were changing. It is not a coincidence that the Cheltenham tracts across the street began the transformation first, with LaMott serving as point of origin for the overall spread of Black communities to spaces with larger renter and apartment developments in Lynnewood Gardens, Laverock in the 1970s, to predominate single-family housing in Melrose Park in the 1990s (See Figure 7-3). Laverock went from 1.1\% Black in 1960 to 40\% Black by 2000, while Lynnewood Gardens, went from 0\% Black in 1960 to 80\% in 2000 (US Census 1960, 2000). Melrose Park would change from 0.2\% Black in 1960 to 27.4\% Black in 2000 (US Census 1960, 2000).

Despite Cheltenham’s current pride of its historical and present diversity the road to providing a space for diverse populations was fraught with conflict. It is apparent that the intention of the early planners was not to provide for a diverse space. In fact, the planners touted that its quality of housing and affluence would be enough to counteract any major racial shifts happening across the street. However, the municipality’s history with diverse populations, and the concentration of Black populations, low-to upper

\textsuperscript{41} Wally Triplett, a Penn State graduate, was the first African American to be selected in the National Football League Draft (Flashback, 1999).
income multifamily housing, and commercial properties alongside Cheltenham Avenue, did not stem the tide of a rapidly changing Philadelphia space but made the Township extremely accessible and marketable to Black and Asian populations who lived across the street. One resident noted that in Cheltenham, “Integration was not something the township sought, but something that was brought” (Goldstein, 1992, quoting a resident).

**Housing Policy**

For potential residents to access the public or private goods of a suburban community, such as the schools, they must be able to afford the housing. Cheltenham’s zoning policy focusing on the location of multifamily housing, commercial enterprises, and minority communities in the Cheltenham Avenue neighborhoods of Laverock, Lynnewood Gardens, LaMott, and Melrose Park explains the breakdown of a physical and cultural boundary between Cheltenham and the adjacent demographically changing Philadelphia residential communities. However, an analysis of the Township’s housing policy further explains how minority and low-to moderate-income communities from Philadelphia obtained housing.

Unlike other Montgomery County municipalities, Cheltenham Township housing opportunities are vast and the cost, type, and location of housing in Cheltenham Township have allowed for a range of income types to gain residency. This section first discusses Cheltenham’s quality and reasonable cost housing stock in comparison to inner ring Montgomery County municipalities. Second, the Township’s multiple multifamily housing opportunities and large renter population brought in low-income to middle income minorities to the Township. Finally, Cheltenham has struggled to provide
affordable housing but does offer housing options for low-to-moderate income minority families.

**Cheltenham Provides Reasonable Cost, Quality Housing**

One Township administrator noted that people come to Cheltenham for the schools, but he came to Cheltenham for the history, the quality of the housing, the stone work, tree lined streets, and convenience to the railroad (Interviewee, 2016). Township planners from the 1969 Comprehensive Plan until present day have praised the historical and quality of housing as a distinguishing piece of the Cheltenham experience (CT, 1969; 2005; local official, 2016; school officials, 2016). However, a plethora of suburban municipalities can boast that they provide beautiful, spacious, quality homes. What makes Cheltenham special is that it has also been identified in various articles in the 1990s until today, such as *Money Magazine* and *Philadelphia Magazine*, as a reasonable option for middle class families wanting to obtain a spacious suburban home and a quality suburban community in comparison to other inner ring Montgomery County municipalities (CSD, 1996, Jan 16; Smith, 2017).

Table 7-6 shows that Cheltenham Township’s 2014 housing value is at $276,000, which is significantly higher than Philadelphia’s, but slightly lower than the median housing value of Montgomery County as a whole. In comparison to the other inner ring suburban communities in Montgomery County, the housing value in Cheltenham Township is more affordable than spaces like Lower Merion Township ($546,600), Lower Moreland Township ($409,500), and Springfield Township ($309,800), yet on par with other Montgomery County inner ring communities in the northwest, such as Abington Township ($268,100), and Jenkintown Borough ($246,700) (ACS, 2010-2014).
Median housing costs ranges from approximately $300,000 in Wyncote, West Elkins Park, and Edge Hill to at the lower end of $200,000 in Cheltenham Village and Glenside (See Table 7-7).

**Table 7-6**: Cheltenham, Philadelphia, and Montgomery County occupancy and tenure (2014)

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Housing Units</th>
<th>Occupied Housing Percentage</th>
<th>Homeowner Occupied Percentage</th>
<th>Median Housing Value</th>
<th>Renter Occupied Percentage</th>
<th>Median Gross Rent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia County</td>
<td>669,642</td>
<td>86.7%</td>
<td>52.9%</td>
<td>$143,200</td>
<td>47.1%</td>
<td>$915</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>326,528</td>
<td>94.3%</td>
<td>72.6%</td>
<td>$290,800</td>
<td>27.4%</td>
<td>$1,146</td>
</tr>
<tr>
<td>Cheltenham Township</td>
<td>15,313</td>
<td>93.3%</td>
<td>62.6%</td>
<td>$276,000</td>
<td>37.4%</td>
<td>$1,084</td>
</tr>
</tbody>
</table>

Source: ACS, 2010-2014

Unfortunately, due to high property taxes and school taxes, real estate entities are steering prospective residents out of the district (local official, 2016). The reasonableness of the housing cost in Cheltenham is counteracted with the amount residents are required to pay to provide for the quality services, opportunities, and upkeep within the Township.

**Diverse Housing Opportunities and Policy Brought in Diverse Populations**

Discussed in the previous zoning section, Cheltenham Township is known not just for its quality of housing, but for its array of multifamily housing and renter opportunities (CT, 2005; MC, 2015). Specifically, the multifamily complexes along Cheltenham Avenue in Lynnewood Gardens and Laverock helped to contribute to the concentration of low-to-middle class, minority populations to the Township (US Census, 1980-2010; ACS, 2010-2014). However, it is important to assess the overall housing picture of Cheltenham Township by analyzing the racial, income, and type of housing
demographics of the individual neighborhood tracts to assess why and how Cheltenham became a beacon for minority and different types of low-income families throughout.

While racial transformations were seen primarily from a north/south perspective, where such transformation mostly impacted the southern portion of the Township along Cheltenham Avenue, income variations in the Township did not truly follow any decipherable geographic patterns. Throughout the decades, Cheltenham Township’s most affluent neighborhoods based on MHI are Chelten Hills, Wyncote, Melrose Park, West Elkins Park, and Edge Hill (See Table 7-7). These neighborhoods consistently supersede the Township, and County MHI and housing value average; while Glenside, Cheltenham Village, Laverock, LaMott, and Lynnewood Gardens consistently fell below the Township MHI and County’s MHI (Table 7-7). Utilizing the data, addressing the access points for minority and low-income populations are reflected in three outcomes.

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42 Glenside has grown to be a more affluent space within the last ten years. From 1980 to 2000, Glenside’s MHI was ranked second to last, next to Lynnewood Garden (US Census, 1980-2010; ACS 2010-2014).
Table 7-7: Cheltenham Township’s tract demographics in order of MHI (2014).

<table>
<thead>
<tr>
<th>Census Tract</th>
<th>MHI</th>
<th>Housing Cost</th>
<th>Rental Cost</th>
<th>Renter %</th>
<th>Poverty Rate %</th>
<th>Non-White %</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Elkins Park</td>
<td>$120,762</td>
<td>$331,700</td>
<td>$1,240</td>
<td>21.7%</td>
<td>4.4%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Melrose Park</td>
<td>$100,650</td>
<td>$244,500</td>
<td>N/A</td>
<td>3%</td>
<td>4.5%</td>
<td>65.4%</td>
</tr>
<tr>
<td>Wyncote</td>
<td>$98,047</td>
<td>$334,100</td>
<td>$1,580</td>
<td>38.1%</td>
<td>11.9%</td>
<td>21.6%</td>
</tr>
<tr>
<td>Glenside</td>
<td>$92,917</td>
<td>$248,300</td>
<td>$1,015</td>
<td>28.5%</td>
<td>10.6%</td>
<td>19.8%</td>
</tr>
<tr>
<td>Edge Hill</td>
<td>$91,413</td>
<td>$303,200</td>
<td>$894</td>
<td>20.5%</td>
<td>6.7%</td>
<td>27.1%</td>
</tr>
<tr>
<td>Chelten Hills</td>
<td>$86,676</td>
<td>$256,400</td>
<td>$1,185</td>
<td>7.5%</td>
<td>5%</td>
<td>21.7%</td>
</tr>
<tr>
<td>East Elkins Park &amp; Cheltenham Village</td>
<td>$80,992</td>
<td>$228,700</td>
<td>$1,040</td>
<td>20.8%</td>
<td>7.8%</td>
<td>29.5%</td>
</tr>
<tr>
<td>Montgomery County</td>
<td>$79,926</td>
<td>$290,800</td>
<td>$1,146</td>
<td>27.4%</td>
<td>6.4%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Cheltenham Township</td>
<td>$75,831</td>
<td>$276,000</td>
<td>$1,084</td>
<td>37.4%</td>
<td>8.4%</td>
<td>45%</td>
</tr>
<tr>
<td>LaMott &amp; Melrose Park</td>
<td>$71,311</td>
<td>$264,300</td>
<td>$1,040</td>
<td>28.4%</td>
<td>8.6%</td>
<td>48.6%</td>
</tr>
<tr>
<td>Laverock</td>
<td>$66,546</td>
<td>$297,100</td>
<td>$1,431</td>
<td>56.4%</td>
<td>12.1%</td>
<td>71.6%</td>
</tr>
<tr>
<td>Lynnewood Gardens</td>
<td>$38,717</td>
<td>N/A</td>
<td>$934</td>
<td>100%</td>
<td>11.6%</td>
<td>91.6%</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>$37,460</td>
<td>$145,300</td>
<td>$922</td>
<td>47.1%</td>
<td>26.7%</td>
<td>58.4%</td>
</tr>
</tbody>
</table>

Source: ACS 2010-2014

Note: The table was color coded to understand the income, housing, and racial dynamics of the tracts. The green tracts represent the top seven most affluent in the Township, with a MHI ranging from $80,000 to $120,000 above the MHI of both Montgomery County and Cheltenham Township, which is represented in orange. The three red tracts have the lowest MHIs in the Township, and used Philadelphia’s demographics as a comparison.

First, tracts with large multifamily and renter percentages are spaces with the highest poverty rate percentages despite median household income. For example, the majority White neighborhoods of Wyncote and Glenside each have a median household income of $90,000, well above Cheltenham’s median household income, but have a poverty rate of 11.9% and 10.6% respectively. The poverty rate percentages are some of the highest in the Township. Additionally, the renter percentage is at 38% for Wyncote, and 28% for Glenside (ACS, 2010-2014). Glenside and Wyncote have a concentration of special needs housing for the elderly, homeless, and mentally disabled populations, plus an array of general multifamily units (MC, 2015, p. 119). Thus, the high percentage of
renters under the poverty rate may be attributed to housing provisions for these special populations.

As noted, to the south are the high renter, multifamily tracts of Lynnewood Gardens and Laverock, which has the lowest MHI, highest minority concentration, and highest poverty percentages, 12.1% and 11.6% respectively, in the Township (Table 7-7). The data overall elucidates that low-income populations of different types are spread throughout the Township in places with high multifamily opportunities. Yet low income, minority communities are concentrated in tracts adjacent to Philadelphia.

Second, minority populations are also residing in affluent tracts. For example, Melrose Park, a 65% non-White neighborhood is one of the most affluent neighborhoods in Cheltenham (ACS, 2010-2014). The MHI is above $100,000, the poverty rate is 4.5%, and Melrose Park does not have significant multifamily housing or renter opportunities (Table 7-7). Even in Laverock, with a 76% non-White population, high multifamily and renter population, and low MHI, the tract has some of the highest median housing cost and renter costs in the Township. Laverock has the second highest median gross rent of $1,431 and the fourth highest housing cost of $297,100 in the Township. Additionally, the Black MHI is higher or comparable to the White MHI in Cheltenham Village and East Elkins Park, Melrose Park, Chelten Hills, Lynnewood Gardens, Laverock, and Edge Hill tracts (ACS 2010-2014). This housing analysis shows that middle to upper income minority populations are choosing Cheltenham.

Third, Cheltenham’s housing policy contributed to the racial transformation of Lynnewood Gardens from a predominately White apartment complex to a majority Black, low-income one. Lynnewood Gardens built in 1948 was predominately for White
tenants (CT, 2005; US Census, 1960-1980). By the 1970s, the space predominately housed an overwhelmingly low-income White elderly population (US Census, 1970). The Township’s Community Development Application\textsuperscript{43} for HUD funding signified that the housing in most need of assistance was the rental units in Lynnewood Gardens, because 52.9% of the population was 62 years or older, 13% of the population was under the poverty rate, 586 families and individuals who received less than $10,000 income spent more than 35% of gross income for housing expenses, and rental units represented 100% of the census tract (CT, 1977).

To rectify the extreme economic differences found in Lynnewood Gardens and even in the Wyncote apartments compared to the rest of the Township, the municipality considered providing rental assistance to low-income populations through the Section 8 housing program (CT, 1977). The Township would not provide Section 8 housing (Conway, 1982). However, residents did obtain rental assistance by Lynnewood Garden’s management up until the 1990s. The prior management was in the practice of lowering the rent of vacant units as an incentive to tenants. The tenants indicated that many families could not afford to live in Cheltenham without the lowered rent (Edmonds, 1999).

The rent in Lynnewood Gardens has always been on par with the rent in Philadelphia. In 1980, Lynnewood Gardens’ median gross rent was $252, while the median gross rent in Philadelphia was at $217 in 1980 (US Census, 1980; CT, 1977). In

\textsuperscript{43} The Township has received $462,200 from 1974-1976 from the Community Development Block Grant Program. They used the $420,000 for 1976 to accomplish four main tasks: 1.) Lighting of outdoor basketball facilities at La Mott and Wall Park; 2.) Community buildings at Glenside and LaMott; 3.) Master plan for Curtis Arboretum; 4.) Rehabilitation of private housing; and 5.) The local share of the Ogontz Urban Renewal Project (CT, 1977).
2014, the median gross rent in Lynnewood Gardens was $934, while the rent in Philadelphia was $922 (See Table 7-7).

By 1980, Lynnewood Gardens was considered an enclave for younger low-to-middle income, minority residents who desired to access a quality suburb. Lynnewood Gardens went from 0% Black and non-White population in 1970 to 91.4% non-White, with an 82% Black population (US Census 1960, ACS, 2010-2014). Furthermore, while Cheltenham continues to be a space for an increasing elderly population, Lynnewood Gardens’ median age was 29 and has the highest percentage of children under 18 in the Township (ACS, 2010-2014).

This analysis of the housing opportunities and income breakdown of the census tracts signifies that due to the array of housing types, Cheltenham Township offers housing opportunities at all income levels at different stages in life. The multifamily and renter options initially used for their growing elderly population provided spaces for low-income populations throughout the Township. Young, low-to-moderate income, minority populations can access the district predominately through Lynnewood Gardens due to its significant low-rent and proximity to the Philadelphia neighborhoods. Furthermore, despite the availability of low-income spaces, Cheltenham serves middle to upper class populations of all races.

**Cheltenham Struggles to Provide Affordable Housing but Does Offer Housing Opportunities for Low-Income Populations**

Despite a real need for affordable housing, Cheltenham has few subsidized housing options. Currently, Cheltenham’s subsidized housing is mostly used for senior housing, such as Samuel A. Green House and Parkview at Cheltenham in Elkins Park.
Furthermore, located in Glenside is the Regional Housing Legal Services (RHLS), which is a non-profit law firm focusing on providing sustainable and affordable housing for lower-income Pennsylvanians. However, the firm is not exclusive to Cheltenham, but serves communities throughout the state (RHLS, n.d.).

The data shows that Cheltenham’s housing policy primarily focused on rehabilitating the already existing housing opportunities already developed for its minority, lower-income housing. Due to Cheltenham’s array of low-to-middle income populations Cheltenham have depended on Community Development Block Grant (CDBG), a HUD program to provide economic development specifically in the LaMott and Lynnewood Gardens neighborhoods (CT, 2010). Cheltenham competes with other entitlement Montgomery County districts to obtain such funds (MC, 2015). Yet Cheltenham has engaged in practices that closed off low-income populations access to low-income housing (Conway, 1982).

During the early 1980s, Cheltenham was embroiled in a five-year fair housing fight with HUD. In 1979, HUD froze $75,000 of Cheltenham’s Community Development Block Grant (CBDG) accounts because the Township failed to provide for new, low-income housing that the Township agreed upon in 1975 (Conway, 1982). The agreement held that Cheltenham would either build low-income housing or utilize existing housing structures to house the 60 low-income families currently living and working in Cheltenham. HUD required that Cheltenham provide housing for 40 families.

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44 Montgomery County distributes CBDG funds to all Montgomery County municipalities except for Abington, Conshohocken, Limerick, Lower Merion, and Norristown (MC, 2015).
45 Cheltenham proposed in 1979 to rehabilitate the Lakeside apartment complex in Melrose Park for low-income housing, but HUD vetoed the plan due to environmental objections. In 1980, HUD vetoed Cheltenham’s other proposal to build low-income housing in Edge Hill (Zucchino, 1981).
who have four or fewer members, 10 families with five or more members, and 10 families with elderly members. Under the agreement, qualified tenants pay 25% of their income for rent and the landlords pay the remainder through HUD subsidies (Zucchino, 1981).

Yet, Cheltenham argued that due to its limited vacant land, low-cost housing would be too expensive to build (Zucchino, 1981). The landlords in Cheltenham Township were also unwilling to participate in the Section 8 program (Conway, 1982). Low-income Section 8 recipients did not find much relief in other suburban spaces because landlords of multifamily complexes refused to accept subsidies (Von Bergen, 1983ab). In 1982, 1,200 Montgomery County residents with Section 8 certificates could not find low-income housing (Conway, 1982).

At the end of the HUD grace period, Cheltenham only managed to place 15 of the 60 families. The Philadelphia HUD officials stated, “Cheltenham had been doing a wild fandango, any kind of dance to avoid building housing project inside of its borders” (Von Bergen, 1983a). Other Montgomery County municipalities argued that Cheltenham’s “didn’t play the game” (Von Bergen, 1983a). The game is “to make it look as if the municipality was actively seeking developers for public housing. Whether it actually wanted the public housing may be irrelevant” (Von Bergen, 1983a).

Affordable housing officials in Cheltenham indicated that Cheltenham did not do their best to build low-to-moderate-income housing (Von-Bergen, 1983ab). This saga ended when the Township commissioners appealed to the HUD officials in Washington D.C, overturning the Philadelphia HUD’s punishment. HUD officials allowed $15,000
of the $75,000 to be redistributed to Cheltenham Township and would allow the Township to apply for the County’s share of HUD’s funds (Von-Bergen, 1983b).

Later in the decade, Cheltenham Township commissioners tried to put a kibosh on the construction of 216-unit garden apartments in Elkins Park. The developer’s lawyers argued that the Township impeded the development to placate nearby residents fear of “renters, poor people, and black people,” while Cheltenham argued that the plan to develop multifamily housing was about “profits” not civil rights (Rubin, 1989).

The analysis of Cheltenham Township’s housing policy specifically from 1960-2000 shows that they were not in the practice of building low-income housing, or utilizing existing housing structures to provide for low-income-moderate housing. Cheltenham’s unwillingness or “inability” to expand its low-income housing opportunities may have kept out low-income minority families from accessing the Township. However, access points do exist in the Township. The multifamily options throughout the Township have allowed populations at different life stages, incomes, and conditions to infiltrate specific neighborhoods.

**Conclusion**

By 2000, Cheltenham Township and Cheltenham School District was solidified in its changing diversity but acceptance of this reality proved complicated. Prior to 1980, Black residents could not access Cheltenham Township and was relegated to segregated spaces in and outside of the suburb. Yet, policies and circumstances between 1960 to 2000 regarding Cheltenham’s proximity to Philadelphia, Philadelphia’s demographic changes, and Cheltenham’s zoning and housing decisions show that Cheltenham
Township was primed to be a diverse district even when such diversity was not initially desired.

The data shows that Cheltenham changed demographically because 1.) The adjacent Philadelphia neighborhoods underwent demographic changes, 2.) Cheltenham Township’s diverse housing stock, multifamily, commercial decisions, and the location of the Black community along Cheltenham Avenue created accessible points of entry for minority, low-to-upper middle-class populations from Philadelphia, and 3.) Cheltenham’s deep history with wrestling with its diverse populations has contributed to its acceptance of its diverse identity. These decisions helped the demographic shaping of the school district’s cultural identity and student population.
Chapter Eight

Cheltenham School District Policies: Wrestling with Diversity

Introduction

In Arthur Hosking Jones’ 1940 book, *Cheltenham Township, A Sociological Analysis of a Residential Suburb*, he asked 625 families why they moved to Cheltenham. The respondents gave over 847 reasons. The majority of responses propagated a desire to obtain more space through better housing (did not want row housing); live in close proximity and accessibility to their jobs in Philadelphia; and, of course, access a quality school district. Jones (1940) writes, “Cheltenham Township for many years has been justifiably proud of its schools. They have become known in the metropolitan area for their excellence. The people of Cheltenham Township have long been interested in the education of their children” (p. 50).

Cheltenham School District (CSD) has a long tradition of providing an excellent innovative educational space for its children. The modern CSD was established in 1838. Yet the impetus of Cheltenham Township’s school system can be attributed to the opening of the one-room, Milltown School in 1795 (Scott, 1983). The Milltown School

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46 In 1834, the Commonwealth of Pennsylvania passed the Common School Law, Free School Act of 1834 to establish the Commonwealth’s public school system. However, many of the school districts, such as Cheltenham did not initially adopt the Act. The first public school opened in Lower Merion (1835), followed by Norristown Borough and Whitpain Township in 1836. In 1835, the Commonwealth had 987 school districts, and only 502 accepted the law by a local vote (Toll & Schwager, 1983).

47 In 1857, the school built a second room, and changed the name to the Cheltenham School. In 1883, the school was torn down and on the same site built the George K. Heller School. In 1953, the school closed and the building is now used as the Cheltenham Art Center (Scott, 1983).
was considered the oldest public school in the Commonwealth of Pennsylvania, lasting 158 years (Scott, 1983).

The CSD system was a pioneer compared to its contemporaries. In 1884, Cheltenham became the first district in Pennsylvania to establish a high school for its students (Toll & Schwager, 1983). In 1903, the school district implemented a transportation program for high school students who lived too far to walk or did not have access to a train (Toll & Schwager, 1983). The district’s first kindergarten program was established in 1909 at the Wyncote School and by 1922, the district implemented kindergarten in all the elementary schools (Toll & Schwager, 1983). In 1938, the district created an adult education program (Toll & Schwager, 1983).

The tradition has continued; Cheltenham Township has always marketed its schools and its commitment to education to attract prospective residents (Jones, 1940; Scott, 1983). Approximately 88% of the student age population attends CSD public schools (ACS, 2010-2014). CSD currently has seven schools: four elementary schools (Cheltenham Elementary, Myers Elementary, Wyncote Elementary, and Glenside Elementary), two middle schools (Elkins Park Middle School and Cedarbrook Middle School), and one high school (Cheltenham High School) to support its 4,500 plus student body (Cheltenham School District (CSD), n.d.).

The residents in Cheltenham are highly educated: about 53.1% of the population has a college degree or more, with 27.8% of which obtained a graduate degree. These numbers supersede that of the Commonwealth, Philadelphia County, and Montgomery County’s education attainment numbers (See Table 8-1).
Furthermore, CSD has one of the highest per pupil spending in the Commonwealth, and third among Montgomery County school districts of $21,280 (Spending, 2013-2014).

CSD is still considered a highly ranked school district that overtime became a beacon for families of diverse backgrounds, race, ethnicities, religions, and even income (school officials, 2016). However, Cheltenham School District has become increasingly embroiled in debates about such quality concerning falling test scores (Pennsylvania Department of Education (PDE), 2015-2016), claims of school violence (Bocella, 2017), high taxes (Montgomery County, 2017), and continued questions about the existing achievement gap between Black and White students (See Bocella, 2017).

**Findings Summary**

Cheltenham School District best exemplifies the promise, concern, and intention of a diverse community and school district. The question this chapter seeks to answer is how the educational policies of the CSD contribute to the transforming racial and economic demographics and cultural identity of Cheltenham Township and school district. Utilizing the housing and zoning findings, CSD has served as both an active and passive arbiter of the boundaries between school districts. The zoning and housing
policies of the Township already constructed permissible, reachable boundaries between Cheltenham and a racially and economically changing Philadelphia space. In response to a quickly transforming Township demography, CSD’s policies had to be revamped to effectively educate a growing diverse student body. The school district actively implemented policies marketing to diverse populations while at the same time sought to reinforce the boundary structure from non-residents seeking to gain access to its school district. The constant demographic push and pull of Philadelphia caused real conflict between Cheltenham residents, the municipality, and the school district to protect as well as reimagine the cultural identity, quality and future of its education system.

The data elicited three key findings regarding the impact of school policy on the demographic shaping of the school district between 1980 and 2000. First, the housing and zoning policies of the Township made accessing a suburban education obtainable for different populations. Second, CSD’s progression in the 1980s and 1990s to adopt a quality, diverse identity made the district more responsive to students of color. Finally, due to its close proximity and conflict relationship with Philadelphia, Cheltenham has used non-resident student policies to actively keep out students from Philadelphia.

**Cheltenham Township’s Housing and Zoning Policies Made Obtaining a Suburban Education Accessible for Diverse Populations**

Permissible zoning and housing policies specifically along Cheltenham Avenue eroded the boundaries between Cheltenham and its racially transforming Philadelphia neighbor (*See Chapter Seven*). Township polices such as the establishment of a historical Black community in LaMott, regional and affordable commercial spaces, and a diverse array of multifamily and single-family housing at various costs all along Cheltenham
Avenue made the Township an affordable and accessible option for a growing minority community with different income ranges and housing needs from Philadelphia. As the Philadelphia neighborhoods along Cheltenham Avenue became overwhelmingly Black, such zoning and housing policies of Cheltenham Township contributed to the increasingly diverse enrollment of the school district.

Yet, CSD’s racial and income diversity overwhelmingly surpasses the racial percentages of the Township (See Table 8-2). Focusing primarily on the CSD demographics from the 1989-1990 to the 2013-2014 school year, the White student enrollment percentages decreased from 65.5% to 36.8%. While the Township would keep its White majority (55%), the school district enrollment percentage became majority non-White (63.2%) (NCES, 2013-2014). Additionally, CSD Free and Reduced Price Lunch (FRPL) percentages have increased over three decades from 4.4% in 1990 to 23.7% in 2014. The data signifies that lower-income and minority families with children are flocking to Cheltenham Township and are utilizing the public schools (See Table 8-2).
Table 8-2: Racial and Income Percentages in Cheltenham Township and School District from 1950 to 2014

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cheltenham Township</strong></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>95.8%</td>
</tr>
<tr>
<td>Black</td>
<td>2.3%</td>
</tr>
<tr>
<td>Asian</td>
<td>0.1%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>N/A</td>
</tr>
<tr>
<td>Non-White</td>
<td>2.4%</td>
</tr>
<tr>
<td>Poverty %</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Cheltenham School District</strong></td>
<td></td>
</tr>
<tr>
<td>Enrollment</td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>N/A</td>
</tr>
<tr>
<td>Black</td>
<td>N/A</td>
</tr>
<tr>
<td>Asian</td>
<td>N/A</td>
</tr>
<tr>
<td>Hispanic</td>
<td>N/A</td>
</tr>
<tr>
<td>Non-White</td>
<td>N/A</td>
</tr>
<tr>
<td>FRPL</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Source: U.S. Census 1960-2010; ACS, 2010-2014; NCES 1990-2014
Note: NCES data only includes school district data from 1987.

In an article in the Philadelphia Inquirer, it was acknowledged that Black families moved to Cheltenham Township because they wanted their children to go to a quality school district, and “quite frankly, felt Cheltenham offered a better racial composition than any other [T]ownship” (Goldstein, 1992). My middle-class family moved to Cheltenham in 1993 because of the proximity to their Philadelphia jobs and access to a quality school district where their Black children would not be the only “chocolate chips” in the classroom (resident, 2016). The existence of a large minority community served as a beacon for minority families seeking a quality suburban destination that would embrace and cultivate the education of their children.
CSD Adoption of a Quality Diverse School District Forced Reconfiguration of its Curriculum and Schools to be Responsive to Students of Color

Particularly during the 1980s and 1990s, the CSD began to adopt a diverse focus, marketing its school district as a quality, affordable option for families of different backgrounds. This adoption did not come easy as conflicts erupted amongst the constituency groups in the school district pertaining to issues of rising taxes, de facto segregation, racism, and maintaining physical and cultural boundary distinctions between Philadelphia and Cheltenham.

Defining Quality

During this period the Township and school district was celebrated nationally for its academic achievement. President Bush held that the “…school district [is] a shining example of what is right in education” (CSD, 1996, Oct 8). Former First Lady Hillary Clinton gave a speech about educational issues in America and chose Cheltenham High School as the location because it was nationally recognized as a great public school (CSD, 1996, Oct 8). Two of Cheltenham’s schools, Elkins Park Middle School and Cheltenham Elementary, were chosen as Blue Ribbon Schools. The National Blue Ribbon Schools program acknowledges public and private schools based on their overall academic excellence or progress in closing achievement gaps among student subgroups (U.S. Department of Education, n.d.).

CSD was also featured in multiple state and regional magazines. In 1992, Cheltenham High School was featured as one of the twelve successful schools in Philadelphia Magazine (CSD, 1994, Aug 13). In the article, the Cheltenham Township was promoted as one of the best places to live and a major factor of that rating was the
school district (CSD, 1994, Aug 13). Another *Philadelphia Magazine* article, titled “Great Schools, Great Towns, Great Buys,” ranked Cheltenham District in the 99th percentile in the county noting SAT scores, size of district, curriculum, and teacher workload as major categories for the honor (CSD, 1997, April 8). In *Money Magazine*, Cheltenham schools were recognized in an article titled “100 Top Schools in Towns You Can Afford” (CSD, 1996, Jan 16). By the beginning of the early 2000s, Cheltenham School District was highly ranked, highly competitive, and highly recognized as a quality school district (CSD, 1996, Nov 11; CSD, 1998, Dec 8).

**Struggling with Integration**

Cheltenham not only prided itself as a quality district but as a diverse district. Cheltenham Township expressed delight at “what they say is their record of successful integration” (Shaw, 1985). However, evidence suggests that the district struggled to articulate and implement policies that would successfully support the educational opportunities and educational assimilation of Black students coming from Philadelphia to the suburbs. Concerns of educational and cultural policies addressing Black students’ needs, mitigating the dearth of minority teachers, implementing non-discrimination policies to curb exclusionary behavior of school officials, and combating the achievement gap all underscore the labor pains in birthing a diverse Cheltenham School District.

**Addressing Black students’ needs.** School district personnel tended to view Black students from Philadelphia as unprepared for the academic and social rigors of Cheltenham’s ‘standards,’ and therefore attempted to provide programs to help with the transition to the suburbs (Shaw, 1985). The Interpersonal Relationship Committee was created to help new minority students adjust. One school district member stated:
The need for such programs are critical, because many [B]lacks are able to afford the move to Cheltenham only after saving up while their children attend and graduate from public elementary schools in the city. The older the children are, the harder it is for many to adjust socially and academically to the suburbs. (Shaw, 1985)

Other programs such as the Educational Enrichment Institution, a voluntary district run program, were tasked in helping teachers learn about cultural differences of their students that “are not the typical Cheltenham students” (Shaw, 1985).

Nothing in the school board minutes suggested programs to help teachers deal with their own cultural biases in educating different types of students or conversations about diversifying the teacher cadre in the 1980s which may have led to tone deaf policies. For example, a member of the Interpersonal Relationship Committee indicated that she would like to see more help for Black students who lacked skills in their own language (English) and suggested that such programs should model the English as a Second Language program which is offered to students from foreign countries (Shaw, 1985). Cheltenham School District also employed a psychiatry program, which worked with school counselors “in the learning-and-adjustment program, for all children who underachieve academically because of social and emotional troubles” (Shaw, 1985).

The school leaders admitted that Cheltenham needed to do much more to effectively help students of color and to adapt to the changing demographic climate of the school district. One teacher admitted, “I’m not sure Cheltenham is cognizant of the change in the system and how to gear the system for education. The kid today is not like yesterday’s child” (Goldstein, 1992). Another school leader stated, “When they say Cheltenham is a good system, that means they take the good students with the high IQs
and keep them good. To me, a good school is one in which you take students who are a real challenge and make them good. Cheltenham faces that challenge” (Shaw, 1985).

Under the guise of providing programs for these new incoming students, such programs in the 1980s were laced with negative perceptions of the educational ability, emotional stability, and cultural distinctions of Black students coming from Philadelphia. In the district’s desire to change these minority students to fit the culture of the all White suburban Cheltenham student body, they may have ignored policies that would indeed change the way school leaders view students of color. A former director of the LaMott Community Center offered this perception of the Black experience in Cheltenham schools, “A lot of parents come to Cheltenham because it’s one of the best places to live and one of the best school districts… They feel they can put their kids in (the schools) and they will get this really good education… Instead… Sometimes you have to be in there pushing for your kids to get a good education” (Klein, 1986).

To alleviate the educational and cultural gap between minority students and school district personnel the school district also worked with private groups focusing on the special concerns of minority families (Shaw, 1985). Such groups include the United Parent Group and the Concerned Parents of Cheltenham Township (Shaw, 1985). The Concerned Parents of Cheltenham Township began as a tutorial program at the LaMott Community Center, working in conjunction with the school district for minority students starting in 1981. Throughout the 80s and 1990s, the Concerned Parents of Cheltenham Township, a group predominately made up of Black parents and professionals served as a check to the school district to make sure that the needs of minority students were being prioritized (CSD, 1981, Feb 10). Dr. Craig Brown, a Black member of the group
required that the organization establish a better relationship with the school board to achieve solutions regarding the existing and potential problems that Black students face in the district. He required that the school district provide the group with data regarding achievement of Black students. Such data includes:

1.) Academic performance for standardized tests; 2.) How many are accepted to college; 3.) How many are in the academic, honors, regular, special ed and other classes; 4.) How many participate in extra-curricular activities; 5.) Is there a difference between those Black students who began their early years in the township versus those that transferred there in later years; 6.) How do you assess this system as it relates to Black students in counseling services, the lack of black professional educators, teacher attitudes, and relationship with their White peers? And should not black colleges be invited to high school for college fairs and other similar events. (CSD, 1996, Feb 18)

The school board minutes never discussed the results of such requests.

Mitigating the dearth of minority teachers. Even though the school district and school board claimed that they have a record of successful integration, that ideal was not seen among the demographics of school leadership. By 1990, Cheltenham school board had two minority group members, Dr. Craig Browne, who was Black and Hyung Pak, a Korean member (Goldstein, 1992). In 1991, Dr. Browne would serve as the first Black president of the school board (CSD, 1991, Dec 3). The district also had two Black counselors and three Black administrators (Goldstein, 1992). However, the lack of teacher diversity proved even starker. In 1990, the school enrollment racial composition was 66% White, 23% Black, and 11% Asian in 1990. Yet, only 15 Black teachers (5%) and two Asian teachers (0.6%) out of 317 served in the district. One of the main concerns of the school board and residents in the 1990s was improving the diversity of the teacher cadre (Goldstein, 1992). The need was dire, specifically for minority students who had minimal representation within school leadership.
In 1994, a resident of the Township filed a Title VI complaint against the school district due their lack of Black teachers and administrators (CSD, 1994, Oct 11). The school district admitted that they needed to do more to hire and recruit minority teachers from the School District of Philadelphia. In a school board meeting in 1995, board and district personnel engaged in a debate regarding the District’s intention and process to obtain minority teachers (CSD, 1995, Jan 10). Some school officials made a list of excuses. One school district administrator argued that to hire more teachers “you have to replace teachers who are fundamentally retiring at max salary with other teachers,” and that there is a small number of minority teachers who are graduating in the region, and that other suburban school districts are competing for this small number of minority teachers (CSD, 1995, Jan 10). Another school board member indicated that they hire teachers through a colorblind approach, claiming that they do not consider the race of the teacher but hire the most qualified teacher for the position (CSD, 1995, Jan 10). A colorblind approach tends to associate the ‘most qualified’ with White teachers at the exclusion of minority teachers (See Bonilla-Silva, 2010; Bonilla-Silva, Lewis, Embrick, 2004).

Other school officials recognized the need to do more than rely on excuses or a colorblind approach to bring minority teachers to Cheltenham. One administration noted that the “passive approach of advertising in journals and newspapers… had not brought upon the desired result in terms of racial mix when you compare students to teachers” (CSD, 1995, Jan 10). The administrator argued that the school district needed to “be assertive and attend college fairs, visit campuses, and to recruit teacher candidates face to face (CSD, 1995, Jan 10).
The school district created a Minority Staffing Advisory Committee in March 1995 to assist the board in recruiting and hiring qualified minority candidates for teaching and administrative positions (CSD, 1999, May 11). The purpose of the committee was to signify to the public that “this effort is being made not just so minority [students] can have role models but that that all children realize that they can learn from all people” (CSD, 1999, May 11). In 1994, the district had 29 minority staff members (7.7%) out of a total staff of 372. By 1996, the district had 38 minority staff members (9.6%) out of a total staff of 393. By 1998, the district had 44 minority staff members (10.9%) out of a total staff of 405 (CSD, 1999, May 11). Even though the district had attempted to recruit and hire more minority staff members, the minutes did not differentiate between staff, teachers, and administrators. Furthermore, the increase in the minority staff percentage in the 1990s was minimal compared to the overall minority student percentage. In 2000, the district had a non-White student percentage of 44% (See Table 2; NCES 2013-2014). An 11% minority staff percentage still left a lot to be desired for minority students and families who still required representation in district personnel (CSD, 1999, May 11). Today, a Black superintendent and three Black school board members out of nine currently lead Cheltenham School District. I have not been able to assess how many minority teachers are currently employed in the school district.

**Implementing nondiscrimination policies.** The 1980s and 1990s marked the district’s adoption of nondiscrimination policies in hiring, as well as nondiscrimination policies curbing private racist behavior of school board members. In 1991, some of the school board members were found to be members of private clubs that restricted
membership to Whites only. The school board issued a statement holding that no
member should be a part of such groups.

In response to citizen inquiries concerning members in private clubs…
No member of the Cheltenham Township Board of School Districts is a
member of any club whose by-laws discriminate on the basis of race,
religion, or national origin. The Cheltenham Township Board of School
Directors and the Cheltenham Township Public Schools are proud of the
racial, religious, and ethnic diversity of its schools. This Board not only
complies with all applicable non-discrimination laws but actively supports
the concept of diversity as a foundation of educational excellence” (CSD, 1991, Oct 8)

Through these nondiscrimination statements, the district furthered their support and
commitment to the importance of cultivating diversity in their schools.

Closing the achievement gap. By the end of the 90s, Cheltenham had adopted a
diverse identity even though it struggled with how to adequately educate and provide for
a diverse student body. In 2000, Cheltenham embarked on an initiative to measure their
achievement gap and asked, “how were their schools perpetuating the gap” (Mezzacappa, 2001). Black families moved to Cheltenham to give their children the opportunities to
thrive in a small suburban district but found themselves being placed into lower tracts.
Black students coming from Philadelphia, who were considered great students across the
street, were being tracked into modified or special education classes. One Black student
argued, “The way it’s perceived, White people overachieve. They’re naturally smart. It’s
not so much that African American and Latino students can’t be overachievers.
Sometimes they’re afraid” (Mezzacappa, 2001). A Black social studies teacher stated,
“we talk about racial profiling by the cops, we have to talk about the same thing in
education” ((Mezzacappa, 2001). Another teacher stated, “if we are routinely moving
students from Philadelphia into modified classes, regardless of achievement level, we
must change that. If Philadelphia is another word for Black, we must change that” (Mezzacappa, 2001).

According to the current Educational Equity Report for the Cheltenham School District, Black students are less likely to be enrolled in high academic programs compared to White students (Civil Rights Data Collection (CRDC), 2013). Out of the 410 students in the Gifted and Talented program, 59 (14.4%) are Black, 298 (72.7%) are White, and 39 (9.5%) are Asian (CRDC, 2013). Out of the 428 high school students enrolled in AP/IB programs, 124 (29%) are Black, 250 (58.4%) are White, and 40 (9.3%) are Asian (CRDC, 2013). There are better percentages of high school students taking Physics. About 31.2% of Black students, 50.5% of White students, and 14.7% of Asian students take Physics (CRDC, 2013). However, Black students are overly represented in school suspensions (83.9%), out of school suspensions (73.7%), and expulsions (100%) (CRDC, 2013). The achievement and disciplinary gaps existing in Cheltenham is a clear sign that just because a district is diverse does not necessarily mean that vestiges of inequities were removed.

CSD in its recent reiteration of its strategic plan recognized that to truly educate a culturally diverse student body, to reclaim its brand of excellence, they needed to deal with their own practices, prejudices, and perceptions that perpetuate inequity. To do so the district noted that it must move from a one-size-fits-all model to a fluid educational system that meets all students where they are…. move from a fixed mindset to a growth mindset that values the individual gifts of each child and holds the entire community to the expectation that all students can and will succeed…. move from a static and inequitable curriculum and instruction model to one that differentiates, offers real world applications and fosters the ability to transfer knowledge across all subjects and experiences…. move from cultural discomfort and misunderstanding to cultural competency and
sensitivity, where the identities of all members of our school community are valued and represented within our institutional practices. (CSD, 2016)

These programs and rhetoric around diversity show how Cheltenham had to reconfigure its school identity, curriculum, and personnel to educate and support its growing minority population. Cheltenham’s demographic shifts required that the district could no longer operate within the confines of a White, suburban Cheltenham school culture. During this period, the district also embarked on a massive redistricting plan to truly integrate its schools.

Creating Integrated Schools

Due to residential migration and segregation in the Township, Black student populations in 1990 were primarily located in the multifamily neighborhoods of Lynnewood Gardens (60.4%) and Laverock (31.3%), and the historical Black community of LaMott (23.3%) (US Census, 1990). The Melrose Park neighborhood was growing rapidly minority throughout the decade (US Census 1990). Additionally, Lynnewood Gardens and LaMott had the largest 0-17 age percentage in the Township. Approximately 26-27% of these tracts’ populations were children (US Census 1990, 2000). Thus, students were coming out of tracts with substantial minority populations. These demographic changes raised the concentration of minority populations in certain schools over others.

During the 1994-95 school year, CSD embarked on a massive redistricting plan focusing primarily on the racial balancing of the district to adequately address the increasing racial changes in the Township (Langland, 1997). A disproportionate percentage of Black students were labeled special education and placed in Glenside and

These racial concentrations and changes caused the district to reexamine the racial, spacial, and special education balance of the elementary schools specifically after a group of Glenside parents brought to the attention of the board that their building was not racially balanced with the other elementary schools. These parents complained that their children’s education was suffering due to the constant disruptions of special education students (Raphael, 1996; CSD, 1996, March 12).

The 1996 redistricting process brought issues of racism to the forefront of the community. The school district and school board took a stand as to what the culture of Cheltenham would look like going forward, as they wrestled with their growing diversity. Accusations of racism and bigotry spewed to and from residents, school district officials, and school board members alike. The process to fix the racial composition of the schools was considered not just a necessary legal task but also a moral one.

In 1995, the superintendent indicated that achieving racial balance was the right thing to do. He stated,

Cheltenham schools should reflect the diversity of the community, which cannot be done with real neighborhood schools, that space available in our K-4 schools can be much better used and that students who are either academically or emotionally at risk should be helped no matter where they are.” (CSD, 1995, April 11)

One of the other school board members indicated, “over the years many changes in our community… and shifting demographics have apparently made these attendance area boundaries no longer relevant…” (CSD, 1995, May 19). The school district and board agreed that the process to redistrict should not be dragged out (CSD, 1995, June 13).
To address the racial imbalance, the school board debated between two main options: 1.) Bus students throughout the Township, specifically focusing on Lynnewood Gardens or 2.) Reopen Lynnewood Elementary (CSD, 1996, March 12). The district chose the first option because busing proved cheaper than renovating Lynnewood Elementary. Furthermore, Lynnewood Elementary is located next to Lynnewood Gardens, which reflected an 84% minority makeup (US Census, 1990). The Lynnewood Elementary option would create a segregated school requiring the school district to spend more in busing White students to Lynnewood Elementary. The redistricting plan sought to create a 70-30% White-Black racial balance at the elementary school (Stone, 1996).

Black parents in Lynnewood Gardens called the board’s action ‘racist’ saying that their students bear the brunt of the busing order and that the board was “caving to racist parents’ demand to have their children educated without Black students” (Raphael, 1996). These parents argued that this plan came into being because White parents from Glenside did not want to be educated with Black kids (Stone, 1996). One Black parent vented, “How dare you [the school board] dictate, that you know what is best for our children. You have left us bound and shackled. We have not moved here to allow...”

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48 The redistricting plan would create a 70-30% White-Black racial balance at the elementary school following the subsequent parameters in rank order of importance:

1.) Siblings—children in the same family will attend the same school; 2.) Class Size—based on existing policy; 3.) Racial Balance—a redistricting plan should reflect a minority population in each K-4 school which is plus or minus 7% of the district minority population; 4.) Special Education/ ESL Programs—these programs should be assigned so that they are spread through the district as much as possible with a guideline that these programs be operated for maximum efficiency and effectiveness in meeting the needs of those special students; 5.) Walkers—where possible students within walking distance of any school should be assigned in a way that maintains walker status; and 6.) Neighborhood School Concept—the concept of neighborhoods school is embraced and should be emphasized as fully as possible. (CSD, 1995, Dec 12)
good ol’ boys to dictate to us” (Raphael, 1996). A White resident indicated that
Cheltenham’s history of racial and even religious inequality has left a deep scar in the
hearts and minds of longtime residents. She noted that allegations of racism hurt: “As a
child she felt the anti-Semitic taunts while walking down Cheltenham’s streets and saw
the large fence the neighborhood’s sole Black family had erected around their home
because it wasn’t safe for them either” (Raphael, 1996). She was against the plan
because she believed that “we are pretending to do something good for the community,
when we’re covering up the racism and class problems [already existing in the
Township]” (Raphael, 1996). This notion of class inequality is also most felt within the
perimeters of Lynnewood Gardens, which is also the poorest neighborhood in the
Township. One Philadelphia Inquirer writer opines that such allegations of racism “are
tough to swallow in Cheltenham, where residents are clearly enamored by their own
diversity” (Raphael, 1996).

Despite accusations of racism by Lynnewood Garden parents, the school board
noted that it could not ignore the racial demographic shifts occurring in the school district
and the schools as is are segregated. During the school board meetings, numerous
residents stated that they moved to Cheltenham Township to attend a top ranked diverse
school district and community. For the school district to claim that that “they are a
diverse community where education is primary value” their school composition must
reflect that diversity (Raphael, 1996). One school board member said it best: "[P]eople
move to Cheltenham in order to have a mixture of cultures, ethnic backgrounds, religious
experiences, and economic hobnobbing and people who do not want that kind of
experience for their children should not move here” (CSD, 1996, March 12).
By 2000, the School Board successfully balanced the elementary schools. All the elementary schools had more or less equal student enrollment, ranging from 415 to 447, equal FRL (12-14%), and a Black population around 35% each (See Table 7-3). Yet due to the growing Black enrollment, this fix would prove temporary. In 2003, the school district redistricted Lynnewood Gardens again to spread the Black student population amongst the elementary schools (school official, 2016). Currently, the Black student populations have been spread equally throughout all of the elementary schools at predominately 50%. However, not balanced is the percentage of students requiring Free and Reduced Price Lunch (FRPL) and the White student enrollment (Table 8-3).

**Table 8-3:** CSD elementary schools’ enrollment, race, FRPL balance before and after the 1996 redistricting plan

<table>
<thead>
<tr>
<th>Elementary Schools</th>
<th>Enrollment</th>
<th>FRL</th>
<th>White</th>
<th>Black</th>
<th>Asian</th>
<th>Hispanic</th>
<th>NW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheltenham Elementary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior 1989-1990</td>
<td>466</td>
<td>N/A</td>
<td>68%</td>
<td>14.8%</td>
<td>16.4%</td>
<td>0.7%</td>
<td>32%</td>
</tr>
<tr>
<td>After 1999-2000</td>
<td>447</td>
<td>13.2%</td>
<td>51.2%</td>
<td>34.9%</td>
<td>10.3%</td>
<td>3.4%</td>
<td>48.8%</td>
</tr>
<tr>
<td>Current 2013-2014</td>
<td>437</td>
<td>30.9%</td>
<td>28.1%</td>
<td>49.2%</td>
<td>13.7%</td>
<td>5.7%</td>
<td>71.9%</td>
</tr>
<tr>
<td>Myers Elementary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior 1989-1990</td>
<td>450</td>
<td>N/A</td>
<td>81.6%</td>
<td>11.6%</td>
<td>6.4%</td>
<td>0.7%</td>
<td>18.4%</td>
</tr>
<tr>
<td>After 1999-2000</td>
<td>426</td>
<td>12.2%</td>
<td>55.2%</td>
<td>32.7%</td>
<td>8.7%</td>
<td>1.4%</td>
<td>44.8%</td>
</tr>
<tr>
<td>Current 2013-2014</td>
<td>346</td>
<td>31.8%</td>
<td>38.2%</td>
<td>46.2%</td>
<td>7.2%</td>
<td>4.9%</td>
<td>61.8%</td>
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<tr>
<td>Wyncote Elementary</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior 1989-1990</td>
<td>364</td>
<td>N/A</td>
<td>68%</td>
<td>31%</td>
<td>1.7%</td>
<td>0.3%</td>
<td>32%</td>
</tr>
<tr>
<td>After 1999-2000</td>
<td>444</td>
<td>14%</td>
<td>53.4%</td>
<td>35.6%</td>
<td>10.1%</td>
<td>0.7%</td>
<td>46.6%</td>
</tr>
<tr>
<td>Current 2013-2014</td>
<td>424</td>
<td>18.6%</td>
<td>37.5%</td>
<td>47.9%</td>
<td>7.5%</td>
<td>2.8%</td>
<td>62.5%</td>
</tr>
<tr>
<td>Glenside Elementary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prior 1989-1990</td>
<td>307</td>
<td>N/A</td>
<td>68%</td>
<td>20.2%</td>
<td>10.8%</td>
<td>0.7%</td>
<td>32%</td>
</tr>
<tr>
<td>After 1999-2000</td>
<td>415</td>
<td>14.2%</td>
<td>56.7%</td>
<td>35.3%</td>
<td>6.2%</td>
<td>1.7%</td>
<td>43.3%</td>
</tr>
<tr>
<td>Current 2013-2014</td>
<td>495</td>
<td>22.6%</td>
<td>45.3%</td>
<td>46.7%</td>
<td>3.2%</td>
<td>2.8%</td>
<td>54.7%</td>
</tr>
</tbody>
</table>

Achieving integrated schools both in practice and policy has proven to be a painful process but necessary in addressing a growing diversified Cheltenham space, especially in the 1980s and 1990s. The data shows Cheltenham’s willingness to constantly redefine and reassess their school policies to address the needs of diverse populations. Even though housing and zoning policies opened the door for minority and lower-income populations to access the Township, the choice of the district to adopt a diverse identity either out of necessity or desire, brought diverse populations to the district seeking a quality school district. However, Black communities and students continually bear the brunt of integration efforts and withstand diversity-focused policies that may see them as problems to solve to maintain the overall perception of a quality school district.

**Nonresident Policies Actively Police Relationship with Philadelphia**

Cheltenham School District marketed itself as a quality, diverse district, but the changing demography also led to the district taking an active role to guard against the Philadelphia influx.

**Nonresident Policies**

As more diverse populations pushed into Cheltenham from Philadelphia, the school district enacted a stricter nonresidency policy to prosecute and push out students and families who did not live in the district. The school board minutes do not address the racial background of the students, but newspaper articles suggested that as the Philadelphia communities across the street became increasingly minority, and as the Philadelphia public schools began to struggle, more lower-income, minority families began to use questionable means such as using friends, family members, or fake
addresses to access the suburban district (Bishop, 1981; Klein, 1986; Woodall, 1986). The former superintendent even took out an advertisement in the Philadelphia Tribune, a historical Black newspaper, to press that only those who live in Cheltenham might use its schools (Stefanski, 1999).

Members of the audience at various school board meetings called such students “illegals,” a term that has been used to describe undocumented, or perceived undocumented peoples in the national immigration debate (Bazelon, 2015). Such a term is laced with discriminatory and racial connotations, regarding the criminal actions of those daring to use the districts resources without buying into the district. Furthermore, the increasing use of the term “illegal” coincided with the rise of minority populations in Cheltenham.

The minutes address the ratcheting of stricter non-resident policies, specifically during the 1980s and 1990s during Philadelphia teacher strikes (Bishop, 1981). The school district wanted to investigate and perhaps adopt a neighboring school district’s nonresident procedure to pay a constable bounty and paying an investigator $15 an hour to root out non-resident students (CSD, 1997, April 8; Bishop, 1981). The district also increased the classification of the secretary of the Director of Pupil Personnel to deal with non-residence issues (CSD, 1998, Sept 8). Yet one of the current school district employees assessed that there is a false perception that there are hundreds of illegal students in the district. He acknowledged students are moving into Lynnewood Gardens and then after two to three years, parents move further inland and buy homes (school official, 2016).
Relationship with the School District of Philadelphia

This concern of non-resident students specifically from Philadelphia in the 1980s may have caused the district to break off its relationship with the School District of Philadelphia. During the 1970s and early 80s, the school district partnered with the School District of Philadelphia, Springfield School District, and Abington School District to operate the Alternative East School or A School. The A School contributed to the formation of regional schools that crossed suburban and urban boundaries, thus offering a greater socioeconomic and racial diversity than school districts (Goldsborough, 2010). Cheltenham withdrew from the Alternative East School in 1983 (Goldsborough, 2010).

The district continued a relationship with Philadelphia allowing Philadelphia students to use their facilities for summer school purposes. Yet in 1984, homeowners from the Cedarbrook Civic Association of Wyncote urged the school board to restrict non-residents from attending the district facilities (CSD, 1984, Sept 9). The homeowners complained that these non-resident students or “outsiders” from the city vandalized property, harassed residents, and cut across private property as they walked home (CSD, 1984, Aug 14; 1984, Oct 9; 1984, Nov, 13; 1985, Jan 8). In general, “non-residents” or “juveniles” were blamed for most criminal behavior associated in Cheltenham Township (Shaw, 1985). The school district acquiesced to the demands of the residents holding that “maybe it would be an error for the board to vote to close the summer school to non-residents, but if we’re going to err, lets err on the side of the residents” (Shaw, 1985). Interestingly, this decision only restricted the students from Philadelphia, but allowed

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49 Lower Merion School District was a part of the Alternative West School (Goldsborough, 2010; See Chapter Six).
“consortium” students from neighboring suburban districts to continue their attendance (CSD, 1985, May 14).

The residents made clear that this was not a race issue, because both Black and White residents experienced harassment by non-residents (Shaw, 1985). However, in 1984, Wyncote’s Black population stood at 1% (US Census, 1980). Race cannot be ignored from this case, because the Black students from Philadelphia were the only ones affected.

CSD continues to actively police its school boundaries through non-resident policies, mostly because one city street blocks the opportunity to access a quality education for Philadelphia students (Bishop, 1981). In 2012, the school district required all the parents to re-register for school enrollment, requiring deed, rental lease, and a birth certificate to ferret out nonresident students (Bestplaces.net, n.d.). Even though Cheltenham has diversified over the decades and access points exist for lower-income populations to utilize the school district, the income and housing value differences between Cheltenham and Philadelphia still serve as an impediment to a lot of families seeking to access a better school district than the one in the city.

**Conclusion**

Cheltenham School District had undergone a dramatic transformation from an all-White student body in the 1970s to a 65% non-White student body in 2014. For the most part Cheltenham School District merely reacted to the changing demography due to established zoning and housing policies creating accessible boundaries for minority populations. The school district’s history of providing a quality education, and its embraced diverse identity through integrating its curriculum and schools, has made the
school district a beacon for minority families. Yet, such demographic shifts have caused residents to fear these newer students from Philadelphia. As Philadelphia changed demographically, Cheltenham embraced a stricter nonresident policy structure attempting to push out Philadelphia students.

According to the evidence adopting a diversity-focused identity required the district to change its policies, ideas, and structure to adequately educate a fluctuating incoming minority community within a few decades. This process proved challenging and the district is constantly on edge to maintain its reputation as a quality school district (See CSD, 2016). As Cheltenham changes demographically, Cheltenham School District’s ranking as a quality school district has declined over time (Boccella, 2015; Bocella, 2017). Complaints of falling test scores and of these newer students only substantiate the perception that the race and income of a student body is attributed to the quality of the school district.

However, a diverse school district, such as Cheltenham is a desirable quality that makes the school district unique. Interviewees of all backgrounds indicated that they came to Cheltenham primarily for its existence and practice of diversity. The District recognizes that its cultural diverse identity and progress is linked to producing an excellent educational environment. To do so, the District must tap into the individual needs, issues, and abilities of its diverse student body. More research will have to be conducted to see how the school district adapts and change to address these needs and goals.

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50 In 2014, The Pennsylvania school-performance profile for Cheltenham School District declined to 74 out of 100 points, one of the lowest scores in Montgomery County. Pennsylvania determines that a score of 70 is sufficient (Boccella, 2015).
The story of Cheltenham Township and School District clarifies how inner ring municipalities and school districts could bring diversity. However, zoning, housing, and school decisions that brought diversity has also led to criticisms as to the quality of the suburb. To reaffirm its quality status, Cheltenham Township and School District embarked on a branding campaign focusing on Cheltenham’s history, present, and future recognition and appreciation of its own diversity. The slogan, “I choose Cheltenham: Historic, Green, Diverse, Creative, Progressive” was published on magnets, bumper stickers, posters, and calendars and given to residents throughout the township. If you drive throughout the northern suburban communities in northwest Philadelphia, you see a multitude of vehicles branded with these bumper stickers. Cheltenham residents are extremely proud of their diversity, and after a long history, such a characterization is branded on the hearts, minds, and of course the cars of each of the residents and students who call Cheltenham home.
Chapter Nine

Discussion

Introduction

The analysis of this study elicited three findings in creating segregated metropolitan jurisdictions. First, narratives matter. Each municipality’s cultural narrative served as a mechanism to create zoning and housing policies used to shape its demographic boundaries from which the school district draws its student body. Lower Merion reflected a Main Line narrative, concentrated in the production of wealth and whiteness. Cheltenham’s narrative focused on creating a diverse community that emerged over time. This chapter first compares zoning and housing policies of Cheltenham Township and Lower Merion Township, addressing six foci: The Black community, commercial, density, housing decisions, and the relationship to the city of Philadelphia through a politics of exclusion and political boundary framework.

Second, municipalities create boundaries. This chapter then addresses how school districts and municipalities do not necessarily function together to create boundaries. School districts are typically reacting to the demographic shifts predicated by the erosion or maintenance of boundaries created by the municipality. School districts mostly reinforce the cultural narrative and norms of the municipality that further exclude or include populations.

Third, the perception of quality suburbs as White spaces allows segregated schools and communities to persist. In addition, this chapter evaluates the link between
quality and whiteness in suburban rhetoric, which promotes a need to protect and exalt White affluent districts over sustaining integrated diverse districts.

I then discuss policy recommendations to address ways in which federal, state, and local jurisdictions can provide and sustain integrated suburban districts. Finally, I address the limitations of this study and offer plans for future research.

**Narratives Matter: Similar Beginnings, Different Outcomes**

For most of these municipalities’ early history, Cheltenham and Lower Merion had very similar cultural and economic narratives. With the emergence of the Pennsylvania railroad in the 19th century, these municipalities served as suburban gateways to the Philadelphia elite and working-class populations (Cheltenham Township (CT), 2005; Geller, 1970). Both municipalities and its current neighborhoods developed along the railroad (Lower Merion Township (LMT), 2016; CT, 2005). Both cultivated small but strong historical Black communities as early as the 19th century (CT, 2005; LMT, 1937; Pottinger, 2015). At the start of the 20th century, both enacted some of the first zoning codes in the country, tasked with managing the growth and affluence of their suburban communities (LMT, 2016; CT, 2005). Such codes promoted idyllic houses for families to enjoy, away from the overcrowded growing immigrant and minority environment of the central city (Pottinger, 2015, p. 1; Silver, 1997; Massey & Denton, 1998; LMT, 1937; CT, 1977). By utilizing discriminatory zoning policies, these suburban enclaves proved to be only accessible to “acceptable” White populations, excluding minority, low-income, and even Jewish communities from certain neighborhoods in each municipality (Geller, 1971; White, 1977; CT local official, 2016).
After WWII, both jurisdictions experienced a record influx of White middle-class populations; causing planners to enact regulations to combat traffic, widen roads, develop housing types, schools, commercial spaces, and parks (CT, 1977; LMT, 1962, 1979). The promise of quality schools in the Cheltenham and Lower Merion School District beckoned families to flee a diversifying Philadelphia area (CT school official, 2016). By 1960, each suburban community represented the stereotypical picture of a quality suburban community and school district—bucolic, spacious homes, affluent, and White. Exclusivity marked the early zoning and housing policy structures and goals of each jurisdiction, with each municipality planning for a predominantly affluent White population. However, these suburban communities deviated significantly during the 1970s, leading to a racially diverse Cheltenham School District and a continuing majority White Lower Merion School District. These communities diverged due to different cultural narratives that cultivated different planning practices concerning the Black community, commercial property, density, housing, and relationship with the city of Philadelphia.

**Cultural Narratives**

Cheltenham Township, Lower Merion Township, and Narberth Borough developed an identity that served as a foundation for future zoning and housing decisions, but in different ways and order. In the case of Lower Merion Township and Narberth Borough, the Main Line narrative developed prior to suburban development. Cheltenham Township’s diverse narrative developed over time. In fact, Cheltenham suburban policies informed the narrative.
These municipalities formed along the Pennsylvania Railroad bringing in wealthy and working-class Philadelphians to the suburbs. However, it was the Main Line connecting the western suburban municipalities that embedded a cultural narrative of concentrated wealth, influence, exclusion, and Whiteness from the beginning (Pottinger, 2015; Geller, 1970). Lower Merion Township and Narberth Borough served as the gateway to the Main Line. The wealth and whiteness of the Main Line narrative offered a premise for planners to maintain a high level of exclusivity by barring those that did not fit within that narrative. Lower Merion would be the first municipality in the country to enact a zoning ordinance to forge up their boundaries to maintain the wealth of the Main Line. At the same time the municipality, along with real estate agents, recruited and steered populations that shared the right social and economic resources to the Main Line (Cook, 1985). This narrative is old and enduring. The Main Line’s reputation is infamous within and outside of the Philadelphia metropolitan area.

Philadelphians migrating to Cheltenham also came from wealth, but according to a Cheltenham local official they were considered the nouveau riche and did not fit within the old money class structure of the Main Line (2016). Cheltenham’s identity was not entrenched in the wealth and class narrative of the Main Line. This may have made Cheltenham more accessible and acceptable to different populations of varying incomes than Lower Merion (See Jones, 1940). Cheltenham’s diverse narrative emerged over time, and was not apparent in the early stages of suburban development. The creation and location of its Black, ethnic White communities, and commercial properties, and the development of its multifamily housing stock prior to 1980, made Cheltenham more susceptible to demographic changes in the 1980’s and 1990’s once Philadelphia
transformed demographically. To support its changing population, Cheltenham had to adopt a diverse identity. Today, Cheltenham’s “I Choose Cheltenham” campaign incorporates its pride in its diversity as a historical, current, and future badge of honor. Therefore, the effects of Cheltenham’s policies informed the narrative.

Local Black communities. Even though the cultural identity of Cheltenham and Lower Merion initially promoted a White, affluent suburban depiction, their working class and historical Black populations aided in the demographic development and segregation between these jurisdictions. Juxtaposed with the overpowering Main Line narrative in Lower Merion, Cheltenham would develop a mix of narratives reflective of the diverse cultures embedded within their jurisdiction that probably made them more susceptible to demographic changes.

In Lower Merion, the emergence of the Pennsylvania railroad in 1850 brought in lower income White and Black populations to work in the industries, the newly constructed hotels, and the homes of the wealthy Philadelphia elite as domestic employees (LMT, 2016, 1937). Prior to the Township’s first zoning ordinance, Black populations were concentrated along the Delaware County boundary line in South Ardmore (LMT, 1937). Pottinger (2015) argued that the dominant narrative of the Main Line associated with White affluent families positioned Blacks existing in these spaces on the periphery and considered Blacks as “only members of a uniform service class” to wealthy White residents (p. 22). But in fact, Blacks and lower income Whites living in Ardmore represented diverse suburban identities that conflicted against the homogeneity narrative of the Main Line. Despite their size, these Black communities fought against the municipality and school district in regard to substandard housing, segregated schools,
programs, and marginalization that disproportionately ignored or burdened their children 
(See Doe, 2011; Blunt, 2014; Holmes, 2013; Porter, 1966).

Blacks settled in Cheltenham Township in the area now known as LaMott, named after the suffragette, abolitionist, and Quaker minister Lucretia Mott (CT, 2005). The community served as a critical station of the Underground Railroad, with several stops/stations located among the houses in LaMott, as well as serving as a training ground for Black soldiers for the Union (CT, 2005). LaMott would become one of the first integrated communities in the country, located on Cheltenham Avenue, along the Philadelphia boundary line (McDonald, 2001). White ethnic minorities such as the Irish, Italians, and Jews also overwhelmingly settled in Cheltenham (Goldstein, 1992).

Discriminatory zoning and housing policies of Cheltenham and Lower Merion confined Black families to their historical settlements of Ardmore and LaMott. Since the 1980s, only the Black populations in Cheltenham have grown and spread throughout the Township, while Lower Merion has confined their Black and lower-income populations to Ardmore and Bryn Mawr. The Black population in Lower Merion Township has remained stagnate at 4-5% throughout the past fifty years (US Census, 1960-2010; ACS, 2010-2014). The Black population in Cheltenham Township has grown from 2% to 33% (US Census, 1960-2010; ACS, 2010-2014).

These Black communities differed in two ways. First, Cheltenham’s Black community initially developed to serve an abolitionist focus, whereas Lower Merion developed a workforce focus that brought in and recruited Black populations to the area. Second, Cheltenham’s Black community developed along the Philadelphia boundary line, in sight of a diversifying Philadelphia area, while Lower Merion’s Black community
situated along the Delaware County boundary line, out of sight of the Philadelphia area. These two factors, which figured into the location and development of the Black community, may have contributed to the continuation of the Main Line narrative overpowering existing Black and even lower income communities in Lower Merion, and the emergence of a diverse narrative in Cheltenham.

**Commercial property.** Planners recognize the need to balance the preservation of residential neighborhoods with commercial properties to subsidize the high property taxes that help pay for services guaranteed in the suburbs (Cook, 1985; LT, 2016). Regional commercial properties can serve as huge draws to those within and outside of the jurisdictional boundaries (MC, 2015; LMT, 2016; CT, 2005). Yet concerns of overcrowding, noise, traffic, and crime, and other issues that threaten quiet suburban residential neighborhoods caused municipalities to enact policies to curb the undesirable usage of their commercial spaces (Mastrull, 2005; Goldstein, 1992; CT policy official, 2016). The type, reach, and location of commercial properties serve to exclude or include populations.

Lower Merion utilized their commercial centers to perpetuate the wealth and exclusivity of the Main Line. Since 1926, Lower Merion planners have taken the approach to create high-end commercial centers throughout the Township, specifically located along the heavily trafficked City Ave (“the Golden Mile”) (Vigoda, 1991). Such actions produced tax revenues alleviating residents’ burden to pay real estate taxes and to provide an economic and physical buffer between the Lower Merion neighborhoods and the Philadelphia neighborhoods (See LMT, 2016). Regional partnership between Philadelphia and Lower Merion have created a City Avenue business district to police,
protect, and develop the commercial space (Kerkstra, 1999). The location and the type of commercial space kept lower-income, minority populations from Philadelphia out of Lower Merion residential neighborhoods.

Conversely, Cheltenham’s regional commercial properties serve as accessible points for lower-income and minority populations from Philadelphia neighborhoods. Cheltenham developed its commercial centers during the population boom of the 1960s (CT, 2005). However, unlike Lower Merion, Cheltenham created affordable commercial properties, and limited the growth of their commercial spaces thus limiting their tax revenue (CT local official, 2016). Planners relegated these spaces to the Cheltenham Avenue boundary in an effort to keep Cheltenham residential (CT local official, 2016). Fear of a diversifying Philadelphia space, and the rise in criminal activity “perpetuated by Black youth” from Philadelphia in the Cheltenham Mall may have prevented the extension of commercial spaces throughout the Township (White, 1977; Goldstein, 1992). Unlike City Ave in Lower Merion that served as a commercial nexus in Philadelphia and Lower Merion, Cheltenham Avenue merely divided two residential communities. Today, the Cheltenham Mall on Cheltenham Avenue is currently being renovated, redeveloped, and rebranded (Parmely, 2017). Cheltenham is desperate to obtain commercial properties that could diversify the tax base, but its status as “urban,” which serves as a colloquialism for being ‘too Black,’ has made it difficult to obtain higher-end businesses (CT local official, 2017).

Density. Preserving space for development in a municipality is not just for conservation but also preserves wealth. Lower Merion made the decision with the 1927 zoning ordinance to zone the western half of the Township for low-density development
(LMT, 1937, 1954, 1962, 1979, 2016). The preservation of the land contributes to the current high value of land and housing in the municipality leaving room for future development (Cook, 1985). Keeping this space low-density also limits the development of multifamily housing, transportation centers, and sidewalks preventing accessible points for even middle-income populations to traverse (LMT, 2016).

Cheltenham heavily developed its community, leaving little available space for future development. Such limitation may serve as a factor along with shifting demographics (age, race, income) to housing in Cheltenham being more affordable than Lower Merion (Nguyen, 2017; Clapp, Nanda, & Ross, 2008). The median housing cost in Lower Merion is $546,600, compared to $276,600 in Cheltenham (ACS, 2010-2014). Minority and low-income communities are generally kept out of Lower Merion because they simply cannot afford the price of residency.

**Housing.** Despite federal and state civil rights legislation attempting to curb discriminatory housing policies there is continued racial discrimination in the housing market (Massey, 2015; Rothstein, 2014; Hyra et al., 2013; Squires & Chadwick, 2006). Massey (2015) acknowledges that the structures that geographically divide populations by race were institutionalized well before the civil rights movement. The effects of such discrimination maintained the residential and school district divisions by race. Even though invidious discrimination dissipated, such discrimination was transformed in the form of clandestine and less visible attacks against minorities (See Bonilla-Silva, 2010; Rothstein, 2017).

Furthermore, suburbs have a range of complex regulatory frameworks that shape who can afford to buy homes in their communities (HUD, 1991, 2005). For example, the
Pennsylvania fair share law forces municipalities to provide a fair share of housing types, which includes single-family attached and detached housing, multifamily dwellings, and mobile homes (MPC, 1968; Surrick, 1977). In theory, the allotment of diverse types of housing increases the opportunities for different types, specifically low-income populations to access the municipality or neighborhood (Bishoff, 2008). However, Pennsylvania case law explicitly holds that the anti-exclusionary, fair share law protects the types of housing and not classes of people (BAC, Inc., 1993). Suburban communities can still price out lower income populations due to the high cost of rental and housing properties (Rowan, 2007; Span, 2001).

The intersection of both trends, the continued racial discrimination in housing after civil rights policies and regulatory frameworks of the suburbs limiting economic access to housing, makes it difficult to racially diversify some suburban communities. Even though Black segregation has fallen over the decades, Blacks remain hyper segregated in heavily zoned metropolitan areas, which include Philadelphia (US Census, 2010; Massey, 2015). These issues are very prevalent in both Lower Merion and Cheltenham. Both communities fall along the gamut of struggling or refusing to provide lower-income housing for families. Nonetheless, there are more accessible points for low-to-moderate income and minority families to access Cheltenham than Lower Merion.

Discounting the history of discriminatory housing policies that initially shut out racial and religious minority populations (Geller, 1970b; 1971; LMT, 1970a) in Lower Merion, most populations of all races are kept out because the cost of housing is exorbitant. Approximately 93% of employees in Lower Merion Township must
commute to get to their jobs (US Census, 2010; LMT, 2016). The Township has recognized the need to provide workforce housing for their employees (LMT, 2016).

The high pricing of homes plays a detrimental role in the continued stagnation of its Black community. Black students who graduated from LMSD, and whose parents graduated from LMSD, cannot afford to move back to their hometown because of the high cost of housing (LMT resident, 2016). In spite of Lower Merion’s growing multifamily housing cadre, its rental opportunities are decreasing specifically in tracts adjacent to Philadelphia (US Census 1960-2010; ACS, 2010-2014).

What is compelling is that Lower Merion has the foundational tools to create room for affordable/workplace housing in the Township. The Lower Merion Affordable Housing Corporation is coordinated to establish more affordable housing and the Township has specified that they would set up an affordable housing overlay ordinance in their zoning code to create incentives to developers to produce workplace and affordable housing (LMT, 2012; LMAHC, 2006). Yet the affordable housing opportunities available are generally used for the low-risk elderly population (LMT, 2012). Providing housing exclusively for the elderly are ways for municipalities to offer affordable housing but still perpetuate segregation by limiting the housing opportunities for minority and low-to-moderate income families (See LMT, 1977). The only neighborhoods that continue to have high multifamily, renter opportunities are in spaces with a higher percentage of lower income and minority populations, such as Ardmore and Bryn Mawr, out of sight of Philadelphia boundary lines (ACS, 2010-2014).

Cheltenham Township has one of the most diverse housing types and largest renter opportunities in the County (ACS, 2010-2014; MC, 2015). Such diversity in
housing provided affordable options for different types of populations at different income ranges and life stages. Low-income populations are dispersed throughout the Township, specifically in places with multifamily housing. However, the concentration of multifamily, renter options, and minority populations is located along Cheltenham Avenue in Lynnewood Gardens and Laverock neighborhoods. The subsequent housing opportunities, especially in Lynnewood Gardens were purposed for a growing low-income elderly population (CT, 1977). As Philadelphia changed racially, these multifamily spaces gave room for minority-low-income families. The rent in Lynnewood Gardens, a 100% renter and 91% minority tract, is on par with Philadelphia’s (ACS, 2010-2014). However, just like Lower Merion, the subsidized housing in Cheltenham is predominately for the elderly (MC, 2015).

**Relationship with the city of Philadelphia.** Philadelphia plays a major role in the maintenance and breakdown of suburban boundaries. During the 1950s and 1960s, the city of Philadelphia was overwhelmingly White, except for various tracts surrounding center city Philadelphia. By the 1970s, White populations began to decline in west and northwest Philadelphia tracts, becoming specifically majority minority by 1980. (See Figure 9-1).
It is no coincidence that migration patterns to suburban communities fluctuated during the civil rights era (US Census, 1950, 1960, 1970). Prior to the 1968 Fair Housing Act and PHRC Act (1955), federal and state policies supported the White migration to the suburbs by subsidizing mortgages for homes, at the exclusion of minority populations (Freund, 2007; Rothstein, 2014; 2017). Yet, the imposition of fair housing legislation and urban school desegregation policies in the 1960s and 1970s allowed minority communities to access urban and suburban spaces and schools that they were initially barred (Orfield, 2001a; Swann, 1971; Keyes, 1973).

These minority migrations and White flight from the city had a huge impact in the demographic changes within inner ring suburban communities like Lower Merion and Cheltenham. For the most part, the west Philadelphia tracts surrounding Lower Merion
are more affluent than the rest of Philadelphia and have stayed majority White (except along City Avenue) contributing to Lower Merion’s economic and racial isolation (US Census, 2010; Romero, 2017; ACS, 2010-2014; Kerkstra, 1999; See Figure 9-1).

Lower Merion utilized zoning efforts to buffer from the Philadelphia space, but with help from regional partnerships with Philadelphia. Philadelphia has heavily developed the Schuylkill River and City Avenue or “Golden Mile” sectors, contributing to the economic and physical walls that exist between West Philadelphia and Lower Merion residential neighborhoods. This partnership might have also contributed to the reason why most of the Philadelphia tracts around Lower Merion did not undergo dramatic racial change.

On the other hand, the Philadelphia neighborhoods surrounding Cheltenham Avenue experienced dramatic racial and economic transition that significantly impacted the racial and economic transitions in Cheltenham (See Figure 9-1; see also Figure 7-3, 7-4 in Chapter Seven). Without significant housing and zoning buffers, the majority Black Philadelphia neighborhoods along Cheltenham Avenue flowed into the Cheltenham neighborhoods with substantial multifamily housing and renter opportunities. By 2000, the southern portion of Cheltenham became a majority minority corridor. Cheltenham also has a regional partnership with Philadelphia; however, Cheltenham Avenue divided residential neighborhoods and is not considered a strong commercial sector in the same vein as City Avenue and the Schuylkill River surrounding Lower Merion.

**Maintaining the Cultural Narrative: Applying the Theoretical Frameworks**

Inner ring suburban communities like Lower Merion and Cheltenham shared a physical and cultural boundary with the city of Philadelphia. Both suburbs perceived
Philadelphia as congested, Black, crime-infested, and low-income (Pottinger, 2013; LMT, 1937; CT, 1977; Nolan, 1997; Goldstein, 1992). The existence of fragmented jurisdictions and the recent push of low-income and minority populations into suburban districts have altered the Philadelphia metropolitan area. Each municipality utilized zoning and housing tools to differentiate and curb the influence of the city. Some jurisdictions were able to construct formidable boundaries, maintaining its homogenous character, while other jurisdictions’ boundaries deteriorated, diversifying the community.

The politics of exclusion model holds that the name of the game is to maintain the systemic perception of a quality White affluent suburb, and the consistent winners of this game has been Lower Merion Township and Narberth Borough (See Danielson, 1976). Lower Merion carefully constructed zoning and housing policies that established a complex array of buffer systems to keep the Main Line wealthy and White for generations.

Lower Merion Township practiced all four dimensions articulated in the planning for control theory. Lower Merion divided the territory of its communities by restricting the expansion of its Black community to Ardmore and Bryn Mawr, out of sight of a burgeoning Philadelphia Black community. For a large part of its history, Lower Merion made these early housing and zoning procedural decisions without assistance, consultation, or agreement of its Black population (LMT, 1937; 1970a). Furthermore, with help from its Philadelphia neighbors, the Township widened the economic gap between these two municipalities and limited physical accessible points for minority and lower-income populations by using its commercial spaces as economic and physical buffers. Such tactics include using high-end commercial property to make money for the
Township and block populations from Philadelphia to access residential communities, reducing renter opportunities, limiting affordable housing for working class and low-to-moderate income families, and limiting density to raise the value of homes.

Cheltenham also practiced exclusionary policies, but did not fortify their physical, economic, and cultural boundaries. The planning for control theory works in part with Cheltenham. Prior to 1970, when adjacent Philadelphia communities were majority White, Cheltenham planners territorially confined its Black population to LaMott and its commercial spaces along Cheltenham Avenue, to impede foot traffic further inland (White, 1977; Shaw, 1985b; Goldstein, 1992). Unlike Lower Merion, Cheltenham did not use its land use polices to necessarily keep out communities from Philadelphia, but confine them along the Cheltenham Avenue corridor.

Cheltenham heavily developed its community to prepare for a growing population and provide diverse housing opportunities for their residents at different income and life trajectories, specifically in view of Philadelphia. Cheltenham believed that their socioeconomic wealth in comparison to Philadelphia would maintain concrete boundaries between the two municipalities (CT, 1977). However, as Philadelphia changed, Cheltenham’s commercial and residential choices prior to the 1980s created access points for middle-class minority and low-to-moderate income populations hoping to obtain housing along that Cheltenham Avenue corridor. Over time, residents already established along Cheltenham Avenue moved further inland to the rest of the Township. Eventually these decisions led to the adoption of a diverse narrative within the boundary of Cheltenham Township.
These distinct housing and zoning choices based upon divergent cultural narratives contributed to the demographic changes and increasing segregation between Cheltenham Township and Lower Merion Township.

**Municipalities Create Boundaries: The Role of Schools**

The municipalities’ role in maintaining and breaking down boundaries is extremely formidable. But what is the role of schools in this process? The data elicited that families often choose suburban communities because of good schools (Langland, 1997). Both Cheltenham and Lower Merion were considered quality educational options that served as an incentive tool to bring in populations within the municipal boundaries (Heavens, 2016; Jones, 1940; CSD, 1997, April 8).

School districts are powerful tools to promote exclusivity or inclusivity. In Pennsylvania they can determine the taxes that residents must pay to provide the needs and wants of the schools, construct divisible boundary school lines, build school buildings, or tear them down, create a curriculum, and hire and fire staff (See Pennsylvania School Code, 1949). School districts can police boundaries of a municipality and decide who can access their schools through nonresidential policies (See Pa Public School Code, 1949; Cohen & Spillane, 1992). School districts can also exclude and include, through the imposition of policies that impede students’ educational opportunities to learn such as school discipline policies (Kim, Losen, & Hewitt, 2010), access and types of academic and extracurricular programs (Stearns & Glennie, 2010), and student assignment policies (McDermott, Frankenberg, & Diem, 2015).

Due to such powers, schools have been known to perpetuate segregation within municipalities (Orfield, 1969; Orfield, 2001a). However, the politics of exclusion model
does not explain how schools perpetuate segregation between districts because the politics of exclusion model primarily focuses on the way land use policies exclude. School districts in Pennsylvania do not have the jurisdiction over the land to shape the physical and political boundaries that divide residential municipalities that in turn determines who can or cannot come into the municipality (See MPC, 1968). Schools serve as a recruitment tool to the municipality, but potential residents still have to get through the municipality door to get to the schools. The municipality’s housing and zoning decisions contributes to the race, class, and number of students accessing the school district\(^5\). Furthermore, municipality decisions contribute to the type and number of real property units that school districts can tax to pay for the provision of education in the municipality. Districts can monitor the boundaries with non-resident policies but they do not necessarily help construct boundaries because school districts and municipalities work in silos. Nevertheless, school districts do reinforce the cultural narrative of the municipality.

**School Districts and Municipalities Work in Silos**

The data elicited that municipalities and school districts do not necessarily work together to effectuate policies regarding zoning and housing development due to the political divisions in taxes and the divided Pennsylvania government structure.

\(^5\) It is important to note that municipality boundaries only impact public school district boundaries. School choice options and policies such as charters or private schools do not require students to be within the municipality boundary (See Wohlstetter, Smith, & Farrell, 2013; Holmes, 2002). However, other school options do have an effect on the class, race, and enrollment of students in the school district. For example, the vast array of private schools located in Lower Merion Township has contributed to 31% of school age students in Lower Merion Township and Narberth Borough attending private schools (ACS, 2010-2014). One former Lower Merion School District administrator noted that the district competes with the private schools for students. Approximately, only 12% of Cheltenham school age students attend private schools.
**Taxes.** One school official indicated that district and municipalities do not work together because the way the tax structure is designed pits the municipalities against the school district (2016).

Most of the taxes paid by residents in a suburban municipality goes directly to the school district, and the district has the power to levy the cost of such taxes (Ross & Turner, 2004; school official, 2016). Both Cheltenham and Lower Merion are older municipalities and have high percentages of residents that no longer have children attending the schools to make the payment of high taxes worthwhile. However, both districts noted that high taxes are necessary to pay for the quality of school programs to improve the overall quality of the municipality (Couloumbis, 2016; CSD, 1996, June 11). Better school districts do not exclusively benefit families with children. Better school districts make the municipality desirable to invest in, which preserves property values in the homes and encourages faster resale rates (McClay, 2015). Recent battles between the district, municipality, and residents in these spaces have typically been related to taxes.

Cheltenham School District has the highest taxes in Montgomery County (MC, 2015; School Taxes, 2013-2014). Cheltenham’s status as an older municipality creates huge problems remedying costly environmental and foundational issues in the Township and schools (McCrone, 2016). Without commercial spaces to buffer the cost for upkeep, residents must pay higher taxes to help provide for the high-end services that suburban residents expect. The high taxes have also caused real estate agents to steer potential residents of all races out of Cheltenham Township (CT school official, 2016). Lower Merion’s commercial properties and relatively high property values keep taxes low. Yet the district is embroiled in a lawsuit with its residents regarding its increase of school
taxes, even though the school district had millions in surplus (Couloumbis, 2016; DiStefano, 2016).

**Divided Pennsylvania government structure.** Additionally, legal evidence exists regarding the lack of policy collaboration or even notice between municipalities and school districts when planning for residential or commercial development. Prior to 2012, municipalities did not have to notify school districts regarding various housing and zoning decisions (Pa MPC, 2012, No. 97, Section 508.1). To mitigate the division both districts recognized a need to create a better working relationship between the municipality and school district. In Cheltenham, the district noted in the school board minutes, the formation of a Township/School district liaison committee, which discussed commercial developments, sidewalks, parks, school policies, use of school facilities by the Township, and safety measures (CSD, 1990, Dec 4; 1996, July 9; 1996, Nov 12; 1997, Apr 8; 1997, Aug 12; 1999, Feb 9). Yet it is not clear the outcome of those meetings or what powers school districts have in housing planning decisions.

In Lower Merion, the school board minutes did not address the relationship between the municipalities and the school district; however, the 2016 comprehensive plan noted that there has been an “excellent working relationship” between the district and Township (LMT, 2016, p. 22). This “excellent working relationship” focuses on plans related to school district facilities such as gymnasiums, playgrounds, and auditoriums but there was no word about the development of residential or commercial spaces. The 2016 comprehensive plan noted that the construction of multifamily housing would contribute to a greater percentage of public school students, but there is no language about the school district’s contribution to the proliferation of multifamily housing in Lower Merion.
Furthermore, further research will need to be conducted to understand the relationship between the Lower Merion School District and Narberth Borough.

**School Districts Mostly Reinforces the Cultural Narrative of the Municipality**

Even though municipalities and school districts work in silos, there is a symbiotic relationship between school demographics, culture, policy, and housing policy as addressed in *Swann* (1971), *Keyes* (1973), *Gautreux* (1976), Dougherty (2012), Lassiter (2012), and Orfield (1997). At first glance, the zoning and housing decisions of each municipality often shape school district’s demographics. These district demographics further inform or reinforce the cultural narrative of each municipality. Municipalities do consider school districts when creating housing policy. In Dougherty’s 2012 study, real estate agents and municipalities use school district curriculum, policies, location of school buildings, districting, demographics, and test scores to recruit populations and steer certain populations to seek housing in communities over others. Yet, the findings of this study also indicate that school district policies may have the potential to tweak or modify the cultural narrative for its students.

Due to the Cheltenham Township’s permissible boundaries the school district’s issues are external. The district constantly must adapt to demographic changes from Philadelphia and continue to supply a competitive quality suburban education. In Cheltenham Township, its growing diversity made Cheltenham School District marketable to minority populations and White populations who want a quality diverse suburban school environment for their children. A school board member stated, "[P]eople move to Cheltenham in order to have a mixture of cultures, ethnic
backgrounds, religious experiences, and economic hobnobbing and people who do not want that kind of experience for their children should not move here" (CSD, 1996, March 12).

However, increasing demographic diversity does not necessarily mean equitable or integrated. Cheltenham was pushed by its growing Black constituents and students to provide an equitable education for its growing minority and lower-income students that may have served to recruit more Black families to the Township. Initially, Cheltenham School District went from providing a school policy to fit Black students from Philadelphia into its suburban, White framework, to attempting to transform the district to better serve a diverse student population (CSD, 2016). Diversifying its curriculum, redistricting to integrate its schools, providing for a larger minority teacher cadre, troubleshooting for falling test scores, mitigating the rise in school violence, and closing the opportunity gaps are just some of the issues that have caused Cheltenham to reassess and redefine its education vision over time.

Lower Merion Township must have accounted for school district demographics in municipality decisions developing high end multifamily housing, low density neighborhoods in the west, reducing renter opportunities along Philadelphia boundaries, and preference subsidized housing for the elderly to limit the influx of students from Philadelphia from using its schools (See Mastrull, 2005; LMT, 1977). Such efforts have mitigated extreme population shifts. The only substantial demographic change in the Lower Merion School District is the growth of their Asian student population. Due to the impenetrable boundaries of Lower Merion Township, the district is replenished with
Main Line “acceptable” families and students: White, affluent, and educated (ACS, 2010-2014; See Geller, 1970).

The district’s issues are inward, having to compete with private schools and provide an education that does not ignore or marginalize its small Black student body that have lived in the Township for generations. Lower Merion School District has embarking in racially charged battles with its Black residents and families. Prior to 1963, it operated a segregated elementary school. Due to the protests and lawsuits by the Main Line NAACP and Black families in Lower Merion Township, the district had to embark on a campaign for minority teachers and improve opportunity gaps (Porter, 1966; Launch Drives for Teachers, 1967; NAACP Probing School Hiring, 1967). It is not clear how many minority teachers and administrators work in Lower Merion School District today. Recently, Lower Merion was sued twice by its Black student population for the disproportionate placement of Black students in lower tracked classes (Blunt, 2014) and for the district’s redistricting plan that disproportionately impacted Black students living in Ardmore (Doe, 2011). For Black families who can afford to live in Lower Merion, there is a question of whether their students would be supported within the district.

Even though Cheltenham School District and Lower Merion School District reinforce the cultural narratives of their municipality, I do believe that schools can also modify the narrative but not without extreme difficulty. Lower Merion and Cheltenham School District are currently dealing with issues that may place municipalities’ zoning choices at odds with the needs and goals of the school district. Lower Merion’s recent law suits concerning its Black student population have at least influenced certain curricular and policy changes, such as adopting a strategic plan, “All Forward,” that
promotes a social justice focused curriculum, eradicating opportunity gaps between Black and White populations, promoting a gender expansive and transgender equity policy, and focuses on the needs of the various diverse communities in the Township. Unlike the municipality, which does not mention race at all in any of its recent comprehensive plans (LMT, 1954; 1962; 1979; 2016), Lower Merion School District has consistently addressed improving racial opportunities and relationships in their school documents (LMT, 1979; 1989; 2014). Such policy changes may have an impact on the perception of its own diversity moving forward. Like Cheltenham, a Black superintendent helm the school district.

One of Lower Merion School District’s limitations in this effort is its Main Line culture that guarantees that whiteness and affluence endures. Lower Merion School District is beholden to tax payers and voters who chose the Township for such exclusivity and the school district benefits from such exclusivity. For the most part, Lower Merion School District is considered one of the best school districts in Pennsylvania and in the nation, where they educate a highly affluent, highly supported, White student body. These equitable educational changes without buy in from the municipality and residents to increase housing opportunities for minority, working class, and lower-income families only serves to guarantee the small enrollment numbers of these communities because they cannot afford the price of admittance to the district.

In Cheltenham Township, the Black population is at 33%, but the Cheltenham School District’s Black student population is at 50%. Cheltenham Township’s poverty rate is 8.4%, compared to 24% of students in the Free and Reduced Lunch Program (NCES, 2014; ACS 2010-2014). Therefore, new demographic shifts in Cheltenham
predominately affect the schools. The school district must prepare for educating a growing Black and lower income student population, and may have a different perspective to land use decisions than the municipality. To handle these rapid changes, Cheltenham School District has attempted to push back against the demographic shifts through adopting punitive non-resident policies and closing its school facilities to School District of Philadelphia students in the 1980s. Due to the rise of Black constituents in Cheltenham, who pay property taxes and vote for school board members, Cheltenham School District is more accountable to these incoming diverse constituent groups.

For Cheltenham, a certified urban planner currently serves on the school board, and the school district’s perspective is integral to conversations regarding a new zoning ordinance for the Township. It will be interesting to see if the zoning ordinance allows for more commercial opportunities in the Township to mitigate the high taxes and a revaluation of its residential policies amid incurring demographic shifts.

The findings indicate that both Lower Merion School District and Cheltenham School District seeks to provide an excellent education for all its students, and currently developed very similar equitable policies and programs to do so. However, each municipality’s narrative determines the cards each school district is playing with. The narratives inform the boundaries in which the school district operates and determines the enrollment, type, and culture of its student body.

More research needs to be conducted on the working relationships between school districts and municipalities in creating diverse communities. Also, more research needs to be conducted on jurisdictions in which the schools and the municipalities disagree on planning decisions or have diverging cultural narratives.
Perception of Quality Suburbs as White Spaces Allows Segregated Districts to Persist

This cross-case analysis described how differences in policies led to the current racial and economic segregation between Lower Merion and Cheltenham School District. However, this policy analysis is just the beginning in understanding how segregation persists in fragmented metropolitan areas. The findings imply that it begins with the suburban construct holding White and affluent jurisdictions as quality.

The heart of school desegregation case law and literature indicates that integrated school spaces have a positive impact on minority and White students (Orfield, 2014; Mickelson & Bottia, 2010; Killen, Crystal, Ruck, 2007; Wells & Crain, 1994). Brown (1954) opined that segregation on the basis of race in schools is inherently unequal, and that the nature of segregation “generates a feeling of inferiority as to their status in the community that may affect their hearts and minds in a way unlikely ever to be undone” (p. 494). Furthermore, systematic segregation also harms White students. White students that are isolated from minority students would lack preparation to function in an increasing diverse society (Orfield, 2009). The segregation also adds to the false of superiority of Whites over other groups that have been systematically discriminated against (Rothstein, 2017). Specifically, minority and lower-income students in integrated schools have higher academic and economic opportunities than students in segregated communities (Rothwell, 2012). However, this goal of integration runs against frameworks that perpetuate whiteness as quality and conflate the existence of diversity with integration.
Quality versus Whiteness

The construct articulated in Freund (2007) holds that suburban communities were originally created for Whites only. Even though the suburbs are rapidly diversifying, the suburban districts most likely to rank high by national and regional mainstream outlets such as *Niche, US News & World Report, Philadelphia Business Journal*, and *Philadelphia Magazine* are those Main Line districts that have been able to maintain their affluence and whiteness for generations. Even amid racial controversy in Lower Merion, White and affluent families continue to flock to the district so that their children can receive a “quality” education (ACS, 2010-2014). Lower Merion’s school enrollment has grown more than any other district in Montgomery County (MC, 2015; LMSD, n.d.-b). I’m not questioning Lower Merion’s quality standing, but it is apparent that a district’s inclusion and diversity status is not an essential factor in the analysis of a quality school district.

Places like Cheltenham who were praised profusely in the 1980s, 1990s, and early 2000s for its quality diverse district are now being passed over by potential residents due to questions of test scores, safety, high taxes, and concerns of a growing Black minority from Philadelphia. Even though the nature of diverse districts means more differentiation in test scores, curriculum, and behaviors, Cheltenham School District’s growing diversity and transition is being painted as a problem instead of as a product to emulate. As more minorities access the district, White populations move out. Inclusivity is perceived as problematic.

The neighborhood-tipping model addressed in the literature review indicates that integrated communities are not stable (Weiher, 1990; Charles, 2003), holding that once
the proportion of minorities reach a certain point, it will irreversibly transition into a minority jurisdiction (Weiher, 1991). So, are diverse, integrated suburban school districts even a goal for White residents in the suburbs, and more importantly are integrated suburban districts even sustainable, specifically in heavily fragmented northern metropolitan areas? Is the achievement of becoming a diverse district a consolation prize to the real winners, those that have been able to keep out minority and low-income populations?

Jurisdictions in fragmented metropolitan areas actively compete for the most “sophisticated” residents, which are generally recognized as White, affluent, and educated to supplement the growth of a municipality, minority students and minority communities are often perceived as inferior. Even the notion of integrated communities can come from a privilege and power center holding that Black students objectively perform better if they go to school with White students; while White students will subjectively learn to live in an increasingly diverse society if they are around minority communities. This rhetoric proposes that for Black students, access to White and affluent spaces are represented as a life and death dilemma; while for White students’ access to diverse spaces propels a better quality of life for a more equitable society. The stakes are different, important, but inequitable.

These inequitable power dynamics attached to race still subject minority populations, no matter their income, at the lowest end of the opportunity spectrum. Among minority groups, research finds Blacks experience the most inequality in terms of health care, education, employment, and housing (Massey & Denton, 1993). Such dynamics are created by policies that exclude minority communities from suburban
communities and from owning homes to accumulate wealth (Shapiro, 2005). These actions perpetuated the belief that the existence of Black populations in White suburbs harm the educational and economic opportunities for White populations by attaching racial discrimination with economic advantage for Whites (Freund, 2007). Policies created segregated schools, desegregated schools, and later pulled back desegregation regulations leading to re-segregated schools (Orfield, 2001). Policies created a de jure/de facto binary allowing residential segregation to validate school segregation (Rothstein, 2017). Policies confined low-income housing predominately in minority, low-income communities (Silver, 1997; Mohl, 1997), and policies institutionalized school initiatives that constantly penalize schools with low or falling test scores that are often discriminatory to minority and diverse communities (See No Child Left Behind, 2001; Darling-Hammond, 2007).

US governmental policies have essentially created a zero-sum-game where it holds that it is in the best interest of White suburban communities to stay the same. Rothstein (2017) argue, “The false sense of superiority that segregation fosters in [W]hites contributes to their rejection of policies to integrate American Society” (Chapter 12, p. 2955 (Kindle Edition)).

**Diversity versus Integration**

Throughout this dissertation I use the term diversity and diverse, but I am really calling for racial and socio-economic inclusion and integration. I define diversity as the existence of different groups of people within a space, jurisdiction, school, program, and organization. Diversity does not necessarily have to pertain to race or socio-economic status, so the call for “diversity” can be used to ignore or minimize the existence,
experiences, and voices of racial minorities and low-income populations. Racial and socio-economic inclusion and integration incorporates, mixes, extends, and celebrates the experiences and voices of minority and lower income populations within the framework, climate, and procedures of systems and institutions. Diversity should lead to a push for inclusion and integration.

In Cheltenham and Lower Merion, diversity and integration mean two different things. To Lower Merion the very existence of low-income communities and minority populations makes them diverse, specifically in comparison to other Main Line Communities. If the Township fulfills the minimum requirements of US laws to at least acknowledge and provide for the small percentage of minorities and low-income elderly population, confining them to live in certain neighborhoods over others, they can utilize race neutral policies that buffer or block the trajectory of low-income and minority populations from actually integrating their affluent White community.

In Cheltenham, diversity is currently recognized as a mandate, a condition, a characterization of their historical, current, and future purpose. Their lack of an effective buffer system, have created a situation where Cheltenham is constantly having to deal with an influx of minority and lower income populations, causing them to constantly reevaluate their definition of diversity and pushing them to integrate their community. Cheltenham is not perfect in this practice, as low-income minority populations are specifically confined to Lynnewood Gardens, but they at least recognize that saying that their diverse, even in comparison to other suburban spaces, is unacceptable without a push to integrate. Even though Brown is still the law of the land, its mandate to desegregate has been systematically overturned by the minimum requirement to be
diverse.

Which brings me to ask what are the levels of diversity that would enact a push to integrate by a municipality and school district? A municipality that systematically blocks minority and lower-income populations from entering, causing small percentages of minorities and low-socioeconomic populations, does not necessarily have to change. Lower Merion School District has embarked on efforts to integrate, but due to the confinement of its Black population in Ardmore, and low Black percentages, the Black community viewed integrative efforts as disproportionately harmful (See Doe, 2011). Yet Cheltenham with a large Black student percentage must embark on plans to reimagine and integrate curriculum, schools, and neighborhoods (See CSD, 2016). Cheltenham struggles in this effort. Black students are less likely to be placed in Gifted and Talented and Applied Placement classes than White students (CRDC, 2013). Additionally, redistricting integrated school efforts disproportionately affect low-income Black students in Lynnewood Gardens (Raphael, 1996).

To address these debates around sustaining quality diverse and integrated suburban school districts it is essential to invalidate the suburban construct holding White affluent suburban communities as superior to diverse and even to minority majority suburban districts. But how do we change that narrative? It must start with public policy. If public policy created the perspective that suburbs are for Whites only, then we must use public policy to invalidate it.
Policy Recommendations

If we—the public and policy makers—acknowledge that the federal, state, and local governments segregated our metropolitan areas, we may open our minds to considering how those same federal, state, and local governments might adopt equally aggressive policies to desegregate. (Rothstein, 2017, Chapter 12, p. 2974 (Kindle Edition))

Sustaining diverse communities is a joint effort requiring housing and school federal, state, local policies, and even private entities. This section describes various housing and education policy suggestions—some that are politically viable and some that are not—that can effectively desegregate and propel diverse suburban spaces.

Furthermore, interspersed in the recommendations I also address Lower Merion and Cheltenham directly, offering suggestions in the hope to create, sustain, and incentivize integrated diverse suburban communities and school districts.

Housing Recommendations


Anti-exclusionary zoning policies: redefining fair share. One step to desegregate suburban spaces is to ban exclusionary zoning ordinances that prohibit multifamily housing or that require only single-family housing (Rothstein, 2017; Kahlenberg, 2017). Providing a fair share of different types of housing options, specifically multifamily housing could open spaces for lower-income and minority communities (Rothstein, 2017).
Fortunately, Pennsylvania has an effective anti-exclusionary fair-share zoning ordinance requiring municipalities to provide a fair share of housing (MPC, 1968; National Land & Investment Co., Pa. 1965). Unfortunately, Pennsylvania courts never made the leap to insist that fair share includes affordable housing unlike its neighbor, New Jersey (See Mount Laurel (1975); Precision Equities, Inc. v. Franklin Park Borough (1994); and Heritage Building Group, Inc., v. Plumstead Township (2003)). Thus, solidifying the rule that the purpose for exclusionary zoning is to protect uses of property and not classes of people. Just because multifamily dwellings are being built, low-income families may still not be able to afford housing (Rowan, 2007; Span, 2001). Without a component protecting classes of people, requiring suburban municipalities to include affordable housing, low-to-moderate income minority families are still blocked from housing and blocked from accessing its quality school system. The Pennsylvania legislature and/or courts must redefine its fair share doctrine to include classes of people.

Rothstein (2017) and Boger (1993) defines fair share to include a representative share of Black as well as low and moderate-income populations in the metropolitan region in each municipality. The Black population in the Philadelphia metropolitan area is around 20% (2010 US Census). Rothstein (2017) argues that municipalities should use a plus or minus 10% rule. Under this rule, any suburb whose Black population is less than 10% should be considered segregated and required to take steps to integrate (Chapter 12, p. 3068 (Kindle Edition)). To incentivize compliance, Boger (1993) argues that homeowners in jurisdictions that do not make progress to racially integrate would lose 10% of their mortgage interest. Furthermore, loss of property tax deductions would increase with every year of non-compliance until the entire deduction would be lost
(Boger, 1993). For those municipalities with a 30% or more Black population, incentives should be in place to help attract non-Black families to live in these integrated communities (Rothstein, 2017). Applying this plan to the case studies would mean that Cheltenham Township is considered a diverse jurisdiction with a Black population of 33%, while Lower Merion and Narberth would be considered a segregated district with a Black population of 5.9% and 1.2% respectively (ACS, 2010-2014).

We must be careful in this effort. In the effort to integrate, we cannot dismiss or relegate an inferior status on suburban communities with strong and powerful minority populations. Due to the racist power dynamics that exist, municipalities cannot be in the practice of pushing out minority communities to bring in more desirable White populations, as seen in urban renewal and gentrification efforts in urban areas (Wilson, 2015; Marcuse, 1985). More research needs to be done to effectively promote the benefits of minority and diverse suburban communities, instead of automatically dismissing them as problematic to truly sustain diverse communities and school districts.

I also believe that more research needs to be conducted over the constitutionality of this plan, because it utilizes race as a factor to integrate spaces and could potentially trigger a strict scrutiny analysis under the Equal Protection Clause. Yet, the generalized consideration of race in efforts to integrate articulated in Justice Kennedy’s concurrence in Parents Involved (2007) decision would not trigger strict scrutiny.

The fair share doctrine should also provide for a fair share of the types of people in need of affordable housing. Suburban communities can avoid efforts to integrate by developing in favor of the elderly. The elderly population offers little risk in changing the culture and the demographics of the community and schools. To truly integrate
communities, the fair share doctrine should also mandate separate percentages of low-to-moderate income family housing, elderly, and disability housing in municipalities. In conjunction, Pennsylvania also needs to pass a statewide source of income anti-discrimination law that would guarantee that local landlords are not discriminating against individuals who use government subsidies such as Section 8 vouchers to pay for rent. Improving fair share without a source of income anti-discrimination law continues to keep out, push out low-income families from accessing housing and school opportunities in affluent suburban areas.

**Inclusionary zoning.** A step further from a state wide fair share, anti-exclusionary zoning policy is to propel a state or countywide inclusionary zoning program (Rothstein, 2017). Pendall (2009) defines inclusionary zoning as a, “mandate in which local governments require residential builders to provide a share of housing that will be affordable over a longer term to people earning low-to-moderate incomes” (p. 224). Anti-exclusionary zoning policies focus on requiring a fair share of different types of housing; however, inclusionary zoning policies focus on providing a fair share of housing for low-to-moderate income populations. The purpose of this policy is to encourage the development of affordable housing in the suburbs as well integrate low-income families to more affluent neighborhoods.

Only two states have fair share requirements based on income, New Jersey and Massachusetts (Rothstein, 2016). Stemming from the *Mount Laurel I* (N.J. 1975) & *II* (N.J. 1983) decision, New Jersey created a statewide Council of Affordable Housing Agency (COAH) requiring every municipality to encourage the development of their fair

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52 Mt. Laurel took 30 years to build a low-income public housing development (Massey, Albright, & Casciano, 2013).
share of affordable housing (Cohen, 2012; Rothwell, 2012). This policy provides developers incentives to set aside a share of the units for low-to-moderate income families. Counties and individual local municipalities specifically in New Jersey, Massachusetts, California, and Maryland, Washington D.C. have also utilized inclusionary zoning policies to diversify the suburban spaces (Pendall, 2009).

Since 1974 Montgomery County, Maryland has been the star representative of inclusionary zoning policies. Developers have set aside a percentage of units (12-15%) in each municipality for moderate-income families (Schwartz, 2010). In exchange, developers are given density bonuses of up to 20% permitting them to develop more housing units than the zoning ordinance allows (National Low Income Housing Coalition, 2014). The County’s public housing authority then purchases a 1/3rd of these housing for lower-income families (Rothstein, 2017). From 1976 to 2010, this program developed more than 12,000 moderately priced homes (Schwartz, 2010; see Kahlenberg, 2017). The success of this initiative is evidenced by the higher achievement of low-income Black students who live and attend schools in Montgomery County municipalities (Schwartz, 2010).

One setback is that inclusionary zoning policies focus on income and not race, which ignores middle-income minority populations, who have been historically excluded from predominately White suburban communities (Rothstein, 2017; Shapiro, 2005). Initially, New Jersey focused on providing housing opportunities for Black families in White suburban communities, but Pendall (2009) signifies that such civil rights purpose has been lost.
In a community like Lower Merion Township, the housing opportunities for low-income or even middle-income families are problematic due to the extremely high cost of housing. The Township does operate an affordable housing framework in the form of the Lower Merion Affordable Housing Commission but it’s not clear if Lower Merion Township would adopt an inclusionary zoning policy on their own, due to the push back from residents to keep the Main Line narrative—exclusive, affluent, and White (See Mastrull, 2005). Lower Merion has already been embroiled in zoning fights over commercial property, schools, multifamily housing, low-income housing, and disability housing (Mastrull, 2005).

Yet, in a study detailing the New Jersey Mount Laurel (1975, 1983) decision and impact, Massey, Albright, and Casciano (2013) argue that the existence of an affordable housing development predominately for families had no effect on crime, property values, taxes, nor diminished the quality of schools and character of the municipality (Semuels, 2015; Massey et. al., 2013). The Mount Laurel (1975, 1983) decision and outcome shows that affluent suburban communities can readily absorb the effects of greater affordable housing opportunities. Lower Merion therefore can also absorb such effects. There are studies that found that sustainable diverse neighborhoods have more socioeconomically advantaged peoples compared to racially transitioning communities (Gould, 2000). Regarding Cheltenham Township, I do not believe that Cheltenham wants to absorb a greater percentage of low-to-moderate income populations since there are already accessible points for such populations in the Township.

Unfortunately, Pennsylvania does not have an inclusionary zoning policy, nor does Montgomery County, Pennsylvania have the power to implement an overall
inclusionary zoning policy for its 62 municipalities. Pennsylvania’s MPC predominately protects the rights of the municipalities to effectuate zoning plans, not the county. The county comprehensive plan establishes the broad goals and criteria, which municipalities may use in preparation of their comprehensive plan and land use regulations, but it is not required. To push for integrated communities especially in metropolitan areas in Pennsylvania, policy makers may have to re-think about the distribution of power between municipalities and counties in Pennsylvania.

Therefore, for affordable housing to be spread throughout Montgomery County, and not in spaces where there is a majority lower-income and minority population, it will take a state or federal mandate for inclusionary zoning. Also, the Pennsylvania Human Relations Commission (PHRC), which is tasked to invalidate de jure and de facto segregation equally, has the legal authority under the PHRA to go after countywide housing authorities and municipalities that prohibits or impedes the development of affordable housing in Pennsylvania municipalities (See Chester Housing Authority, 1974; PHRA, 1955). More research will need to be conducted to determine how inclusionary zoning policies can work in local jurisdictions and in the Commonwealth.

**Improving accountability in the Fair Housing Act of 1968.** Under the Fair Housing Act of 1968, individuals who believe that they have been victims of a discriminatory (intentional and impact) housing practice may file a complaint with the Department of Housing and Urban Development or file a lawsuit in federal and state court (HUD, n.d). Additionally, for municipalities or counties that serve as a grantee to receive HUD funding—such as Community Block Development Grant (CBDG) or other HUD grants, they must use the funding to aid in benefiting low-and-moderate income
persons or to provide other community development needs. Grantees also must develop a consolidated plan asserting that the CBDG assisted activities would be conducted in a timely matter. But it is not clear what municipal actions would be considered not sufficient or efficient to receive HUD funding, specifically under Secretary Ben Carson in the Trump Administration\textsuperscript{53}.

For example, Cheltenham in the 1980s was tasked to create low-income housing opportunities for 60 residents and failed. HUD then held back its funding from Cheltenham for five years. Cheltenham would eventually recover its funding after changes in the political climate, even though they did not develop the low-income housing initially required by HUD. This example shows that HUD can hold a municipality accountable, but without a clear formula dictating what is necessary to receive funds, municipalities can continue to make half-hearted efforts to provide affordable housing. Furthermore, it seems that protracted punishments over suburban communities are futile due to political pressure to protect suburban municipalities instead of protecting the goal of providing affordable housing.

In 2015, HUD issued a new rule in response to the recent Inclusive Community Project (2015) Supreme Court decision. HUD has deemed the previous process of municipalities submitting AI’s insufficient and requires that cities, regions, or housing authorities submit a document called an Assessment of Fair Housing detailing integration patterns, access to high quality affordable housing, and input from the community. It will

\textsuperscript{53} It is unclear how much funding HUD will receive under the current Trump administration. President Trump released its FY18 budget, and planned on cutting $6.8 Billion specifically in funding affordable housing programs (Affordable Housing Online, 2017).
be interesting to see if these new changes in HUD policy hold municipalities accountable to providing affordable housing.

**Education Solutions**

The findings showed that housing and zoning policies predominantly creates the jurisdictional boundaries from which school districts draw their student populations. I addressed the influence of county wide or regional school districts, the need to reevaluate the evaluations of schools and districts, and the creation of a curriculum that addresses systemic discrimination in schools to alleviate the impact of de facto segregation between suburban school districts.

**Countywide or regional districts.** In Montgomery County, there are 62 municipalities and 23 school districts. Fragmentation only perpetuates segregation. Consolidating the school districts into county wide or regional wide school districts might serve to desegregate these districts (Clotfelter, 2004). Furthermore, consolidating more school districts might also allow for desegregated municipalities, specifically in inner ring suburban communities.

Families often choose municipalities because of the schools. With a regional or a county wide district, families can have a wider range of municipalities to choose from to access a diverse quality suburban school district, instead of primarily focusing on predominately White, affluent districts (Orfield & Frankenberg, 2011). However, the opposite can occur. Within district segregation can arise, because as it currently stands the suburban municipalities are extremely segregated by race and income, and so would the schools. Without a housing policy and school district policy set to desegregate we would continue to have segregated schools (*See* Frankenberg & Lee, 2002).
Moreover, in spaces like Lower Merion, that have a strong historical and cultural connection to other Main Line districts, they may be more likely to consolidate with districts that have similar cultural and demographic similarities (LMSD, n.d.). Such action only perpetuates segregation.

Furthermore, it might be very difficult for these municipalities and school districts to give up their independence and privilege. Cheltenham and Lower Merion have existed since 1682 and their schools can be traced back to the 1700s. Without the threat of a legislative or judicial mandate to consolidate, largely populated townships like Cheltenham and Lower Merion are not going to voluntarily consolidate or merge with local school districts for the purpose of becoming more diverse. Montgomery County does have examples of multi-municipality districts that serve four or five municipalities at a time such as the North Penn School District, Souderton School District, Perkiomen Valley School District, and Upper Perkiomen School District. However, these districts are further out in the County, and except for North Penn (large Asian population) they do not have the racial and ethnic diversity to make a dent in invalidating the racial and economic segregation between municipalities in the County (Murphy, 2009).

Consolidated or merging districts would help to desegregate these districts, but there is a clear political barrier to do so (See Chapter 4 on consolidation). More research will need to be conducted to understand consolidation and mergers in northern school districts, as well as collaboration opportunities between districts for suburban and urban students to attend classes and programs across district lines.

**Reevaluating quality districts.** A more probable plan is the reevaluation of districts. For the most part our perception of quality districts reflects an affluent, White
bias that ignores diverse, integrated, and minority school districts. Real estate entities, parents, and legislators use websites such as *Niche, US News* and *World Reports*, and *GreatSchools* to determine what school districts are deemed quality, therefore determining what municipalities are quality. These sites have huge housing and school implications, helping to perpetuate stereotypes about certain neighborhoods and schools. To challenge the White, affluent equals quality perspective; it is essential that these sites also change how they evaluate neighborhoods and schools.

For example, *GreatSchools* is providing a more equitable view on evaluating school quality (Sparks, 2017). Instead of focusing on just academics, they have an equity rating, to determine existing achievement and opportunity gaps within the district. This equity rating measures school climate, course offerings, and student growth for minority and poor students. *GreatSchools* are also using federal civil rights data to highlight schools with disproportionate discipline rates and high rates of student absenteeism (Sparks, 2017). Utilizing equity as a metric could support districts actively moving to promote educational opportunities for diverse student bodies.

Furthermore, starting in the 2018-2019 school year, Pennsylvania Department of Education (PDE)\textsuperscript{54} will adopt the Future Ready PA Index that is supposed to create a more holistic approach to evaluating school effectiveness as part of its Education Every Student Succeeds Act (ESSA) plan (PDE, n.d.). According to PDE, the proposed index will address the unequal weighting on standardized testing, increasing student growth

\textsuperscript{54} The Pennsylvania Department of Education (PDE) is also complicit in the negative perception of diverse and minority schools under the Adequate Yearly Performance (AYP) under the former No Child Left Behind Act of 2001 and the School Performance Profile (SPP) accountability measurements. Both measurement standards heavily weighted outcomes of standardized assessments as an indicator of school effectiveness. This process disproportionately applied negative statuses and even punitive sanctions effecting federal Title I funds on schools and communities with a high percentage of low-income students, students of color, and neighborhoods with low property values (Klein, 2015; Fuller, Nguyen, Pendola, & Levitan, n.d.).
measures, measure English language acquisition among ELL students, incentivizes career awareness reporting and emphasis on student access to rigorous course offerings in AP, IB, college credit, and Career and Technology Education programs (PDE, n.d.). I am curious to see how the Future Readiness Index weighs these indicators, and evaluates school district and school effectiveness through a lens that captures student achievement in a more comprehensive way, that does not negatively assess demographically changing districts.

**Teaching systemic discrimination in the curriculum.** Shapiro (2017) and Rothstein (2017) argue that our past housing discriminatory policies created the segregated spaces and contributed to the wealth and educational disparities between population groups. Bonilla-Silva (2017) discussed how overt discrimination recognized during Jim Crow has been replaced by covert discrimination that continue to cut short the opportunities of populations of color. Therefore, it is essential that our school curriculum discuss the effects of systemic discrimination. We teach civil rights as if discrimination ended in the 1970’s after the Civil Rights Act, Voting Rights Act, and the Fair Housing Act of 1968. Yet we fail to teach the effects of discrimination or current forms of discrimination on populations. It would be beneficial to teach past and present housing, poverty, and education policy in middle school and high school social studies curriculums across the country. The PHRA and regional housing and education organizations such as Building One America and the Fair Housing Rights Center in Southeastern Pennsylvania can work with schools and communities to discuss the effects of de facto segregation in Pennsylvania (See Building One America, n.d.).
This dissertation showed how policies can create, sustain, and breakdown boundaries between jurisdictions or that can further segregate jurisdictions. Yet local policies, education, professional development, and legal inquiries specifically targeting de facto segregation as an outcome of systemic discriminatory policies can make a significant difference in creating future sustainable diverse/integrated communities and schools in Pennsylvania.

Limitations and Opportunities for Future Research

Limitations

There were limitations in conducting this study. First, conducting an embedded multiple case study from 1960 until 2014 for two school districts and three municipalities required an extensive quantity of sources and time (See Yin, 2014). However, a multiple case study design provided the space necessary to fully investigate the newer forms of segregation pertaining to increasing segregation between districts (Lichter et. al., 2015).

Some of the documents that I initially wanted to procure were not available because the County or the municipality misplaced or threw out the documents. Effective assessments of the housing and school policies of my sites were therefore limited because the data was not available. Furthermore, because each local jurisdiction had different practices in collecting, storing, and distributing documents the content from each jurisdiction varied. For example, I was not able to obtain housing documents from Cheltenham Township. They were in the middle of renovating their document center and could not or would not look for specific housing documents. Such documentation was not online. I had to go to the County to get access to Cheltenham comprehensive plans.
Lower Merion Township put their entire comprehensive plans online and I obtained access to other housing documents at the Township building.

To overcome this obstacle, I had to utilize a variety of data sources such as newspapers, interviews, historical archives from various historical societies to obtain a comprehensive view of the policies and conditions that contributed to the demographic shaping of Cheltenham and Lower Merion School District.

Furthermore, I used interviews to help fill in the gaps about the policy conditions and culture of each jurisdiction from a particular time frame. However, my interviewees tended to skew predominately White. This condition existed because most of the leadership in place in the County, school districts, and municipalities tended to be White. The race of the interviewee is important to offer richer insights in how policy is created, interpreted, implemented, and how it affected each community, specifically the Black community. I used newspaper articles and documents that focused on the Black community’s experience to overcome this limitation.

Future Research

These limitations offer opportunities for future research. First, studies on how local municipalities and school districts store, collect, dispose of, distribute and transcribe information about the inner workings of their jurisdictional structure needs to be researched. These documents represent an historical archive to the thoughts, ideas, and policy goals of these local governments and school districts, and the lack of data especially on issues related to racial inequities and divisions also tells a story as to the thoughts, ideas, and policy goals of these districts and governments. Second, more research needs to be conducted on the individual stories of Black populations living in
Ardmore in Lower Merion Township, and LaMott and Lynnewood Gardens in Cheltenham in the wake of school and housing policy decisions that disproportionately impact these communities. Third, the unique racial and income demographics of each of Montgomery County’s municipalities offer opportunities to repeat this study that will not omit smaller municipalities like Narberth Borough.

Finally, more studies need to be conducted to analyze major transition points in housing and education de facto segregation policies in the US and in Pennsylvania. In the dissertation there were five major turning points. First was the change in the fair share doctrine from a commitment to providing for types of people to types of housing. Second, Pennsylvania’s commitment in invalidating de facto segregation led to creation of the PHRA and the PHRC as its enforcement and administrative arm. However, the goal of remedying de facto segregation has been unseated with the goal to provide a quality education in segregated districts (See SDP v. PHRC case law). The third turning point regarded the demographic shifts in the Philadelphia metropolis in the 1970’s and the effect on inner ring suburban demographics. Fourth, the move toward equity policies in schools, even in majority White districts may help to transform exclusive and systemic cultural narratives of certain municipalities. This push towards equity as seen in Cheltenham and Lower Merion School District will have huge implications to remediing institutional and systemic discrimination and bias in schools and hopefully residential settings.

Finally, a turning point not discussed but at the forefront of national conversation was the current change in federal administration in housing and education. We know that presidential administrations can change, transform, and dismantle goals to desegregate.
Under the current Trump administration there has been a disassembling of civil rights policies and enforcement of those policies that place the goal of remedying the effects of income and racial housing and school segregation and discrimination in peril (Elperin, Brown, Fears, 2017; Huseman & Waldman, 2017). Future studies will address this administration’s effect on federal, state and local affordable housing policy, community development, segregation, and educational opportunities and choices.

**Conclusion**

Due to the recent demographic shifts of minority and lower income populations in the suburbs, it is essential to understand how housing and school policy contribute to the racial and economic segregation between suburban school districts and communities. Initially, this study sought to press that de facto segregation is de jure segregation and the promotion of integrated communities and schools requires a revaluation of how our federal, state, and local policies address, understand, and remedy residential segregation. To do so, it is essential to counteract prevailing notions that continue to accept racial and economic segregated between suburban communities and schools as the norm instead of a product of a complex history and system of discriminatory state based practices privileging Whites and White communities at the exclusion of minority communities.

Focusing on Pennsylvania and two inner ring school districts from the Philadelphia metropolitan area, I discovered that the culture of fragmentation and local control in Pennsylvania is pervasive, where municipalities determine the cultural narrative from whence housing and school policies are formed. Such narratives can either promote or invalidate segregation by shaping the boundaries that would exclude and include minority and lower-income communities.
Interestingly, federal and Pennsylvania housing and education framework provides a foundation for policies to promote suburban affordable housing and suburban residential desegregation. US housing doctrines from the Fair Housing Act, the Housing and Urban Development Department, the Pennsylvania Human Relations Act, to the fair share anti-exclusionary policies in Pennsylvania all purposed to provide housing opportunities for all. The Pennsylvania Human Relations Act specifically sought to invalidate de facto segregation as well as de jure segregation. Furthermore, our education EPC case law initially sought to invalidate school segregation (See Brown v. Board of Education, 1954). However, in spite of the beneficial purposes behind these initiatives, the implementation and recent interpretation of these policies continuously girds up boundaries between peoples and spaces, maintaining suburban spaces for White and affluent populations, and confining the opportunities of our most marginalized populations.

In Pennsylvania, the courts and the Municipality Planning Code (1968) protects the rights of developers to build different types of housing, and the local power of municipalities to exclude types of people, instead of protecting the rights of peoples from all different walks of life to live in these suburban communities (See re Petition of Dolington Land Group, 2003; BAC Inc., 1993).

Focusing on Lower Merion and Cheltenham provided the opportunity to understand of how narratives shapes policy and how policy shapes narratives. Lower Merion is a product of embedded structural racism glorifying a suburban identity that promotes and defines suburban spaces as White and affluent. Their housing and even school policy works to validate that narrative with the continual exclusion of lower
income and minority populations. Yet, Lower Merion through its plethora of multifamily housing options, the Lower Merion Affordable Housing Corporation (LMAHC), opportunities for a zoning ordinance promoting affordable housing, its equity focused school programming has the foundational housing, school programming, and the wealth to incorporate a larger minority and low-income population. If they could utilize those established programs to bring in more renter opportunities and workforce housing for minority and lower-income populations Lower Merion Township and their School District would exemplify a jurisdiction that is truly both integrated/diverse and quality. However, it fights to preserve the current cultural narrative instead of embodying something different, something better.

Furthermore, social science literature show that diverse, integrated communities and schools such as Cheltenham have the potential to best prepare students of all races to live, be academically successful, and to push for an equitable and diversified world (Orfield, 2014; Mickelson & Bottia, 2010; Killen, Crystal, Ruck, 2007; Orfield & Lee, 2005); yet these communities are not touted in the same prestige as majority, affluent districts like those along the Main Line. However, its future growth is often impeded by the extremely high taxes that residents pay. If Cheltenham’s tax issues were assuaged, it might stem a lot of negative criticism from the public, media, and outsiders and aid the economic and population growth in the Township and school district.

The recent diversification of the suburbs provides a great opportunity to integrate communities and school districts, but to do so those diverse populations and

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55 Oak Park Village, Illinois, an inner ring suburban municipality of Chicago, does offer an example as to the economic success and popularity of a racially integrated residential and school community which drives up the housing costs (Orfield, 2012; Frankenberg & Kotok, 2013; McKenzie & Ruby, 2002). Oak Park made the decision to regulate the racial composition of apartment buildings to disperse minority populations throughout the municipality (McKenzie & Ruby, 2002).
schoolchildren must live in the same suburban community. Inclusionary zoning policies, regional or countywide districts, reevaluating how we measure quality districts, and teaching students about the effects of discriminatory housing and school policy could help delegitimize the role segregation has on our cultural boundary structures, and promote diverse educational and residential opportunities for minority and low-income students.

The real question is whether our suburban municipal and school entities would take that next step outside of the status quo, by recognizing the devastating effects of de facto segregation, and renounce their historical and deeply rooted narrative that propels White spaces as quality and excludes minority/low-income populations. If we can get there, acknowledging that current suburban segregation is a product of state action, that de facto segregation is de jure segregation, then we might have a chance to change the narrative.
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Inquirer, A01.


# Appendix A

## Case Law List and Description

<table>
<thead>
<tr>
<th>Case</th>
<th>Year</th>
<th>Court</th>
<th>Type</th>
<th>Description: Main Point</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Plessey v. Ferguson</em></td>
<td>1896</td>
<td>US Supreme Court</td>
<td>Public Accommodations</td>
<td>Created the doctrine separate but equal in public accommodations, including schools. Led to the federal validation of explicit state segregation policies and laws.</td>
</tr>
<tr>
<td><em>Village of Euclid v. Amber Realty, Co.</em></td>
<td>1926</td>
<td>US Supreme Court</td>
<td>Zoning</td>
<td>Validated the power of zoning for states and local governments</td>
</tr>
<tr>
<td><em>Brown v. Board of Education</em></td>
<td>1954</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>Overturned the separate but equal doctrine in the field of public education.</td>
</tr>
<tr>
<td><em>National Land &amp; Investment Company. v. East town Twp. Board of Adjustment, Kohn, Pa.</em>*</td>
<td>1965</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>A zoning ordinance that would prohibit the development of smaller, less expensive homes, such as apartments is exclusionary and illegal.</td>
</tr>
<tr>
<td><em>Huber v. Pennsylvania Human Relations Commission</em></td>
<td>1967</td>
<td>Common Pleas Court of Dauphin County, Pennsylvania</td>
<td>Zoning</td>
<td>The Pennsylvania Human Relations Act was a proper exercise of the police power of the Pennsylvania legislature to prohibit discrimination in housing and did not violate the Equal Protection Clause.</td>
</tr>
<tr>
<td><em>Pennsylvania Human Relations Commission v. Chester School District</em></td>
<td>1967</td>
<td>Supreme Court of Pennsylvania</td>
<td>Education</td>
<td>Interpreted the PHRA to protect against all forms of segregation including de facto segregation practices.</td>
</tr>
<tr>
<td><em>Green v. County Board of New Kent County</em></td>
<td>1968</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>The “freedom of choice” plan was not sufficient to desegregate a school district. School districts must provide a plan that would effectively dismantle a segregated school system.</td>
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<td>Case</td>
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<tr>
<td><em>Girsh Appeal</em></td>
<td>1970</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>Suburban municipalities cannot keep out people who desired to move to the suburbs from the inner city by excluding apartment dwellings.</td>
</tr>
<tr>
<td><em>Hoots v. Pennsylvania</em></td>
<td>1971-2003</td>
<td>United States District Court for the Western District</td>
<td>Education/Zoning</td>
<td>Led to five districts merging to form the Woodland Hills district in 1981 to remedy the previous consolidation of three majority Black school districts in 1962. With court oversight to maintain integration between the schools, levels of racial inequities in the form of curricular tracking, discipline practices, and school staffing were found to exist. The district was declared unitary by 2003.</td>
</tr>
<tr>
<td><em>James v. Valtierra</em></td>
<td>1971</td>
<td>US Supreme Court</td>
<td>Zoning</td>
<td>A community may exclude publicly assisted housing from HUD through voter referendum, meaning that suburban communities do not have to accept federal funding and do not have to build public housing.</td>
</tr>
<tr>
<td><em>Swann v. Charlotte-Mecklenburg Board of Education</em></td>
<td>1971</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>Court recognized that discriminatory school district policy decisions combined with existing residential segregation, based on neighborhood zoning policies, proliferated school segregation. The Supreme Court allowed the district court to force unwilling school districts to adopt certain equitable remedies such as racial quotas, redistricting, busing, and the construction of new schools to effectively desegregate schools that serve racially segregated neighborhoods.</td>
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<td>Case</td>
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<tr>
<td>Balsbaugh v. Rowland</td>
<td>1972</td>
<td>Supreme Court of Pennsylvania</td>
<td>Education/Zoning</td>
<td>Held that the Commission had the authority to utilize tactics such as busing to cure residential segregation and that eliminating neighborhood schools was not an equal protection violation.</td>
</tr>
<tr>
<td>Pennsylvania Human Relations Commission v. School District of Philadelphia (SDP)</td>
<td>1972-2009</td>
<td>Commonwealth Court (PA)</td>
<td>Education</td>
<td>Beginning in 1972, the PHRC targeted the School District of Philadelphia as a district unlawfully segregating students on the basis of race and required the District to correct de facto segregation within its schools (PHRC v. SDP, 1972, 1973). A series of court decisions between 1972-2009 showed the back and forth between the school district, the PHRC, the community, and the court, all culminating into the ultimate rejection of desegregating schools as a goal and replaced with the mandate to improving the educational opportunities within segregated schools</td>
</tr>
<tr>
<td>Keyes v. School District No. 1, Denver, Colorado</td>
<td>1973</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>The Court found that the Denver Public Schools practiced de jure segregation. This is one of the first cases where the Court recognized segregation in northern schools. The Court in Keyes differentiated between de jure segregation and de facto segregation, holding that only policies that intentionally segregate on the basis of race, “de jure” segregation violate the EPC. De facto segregation, based upon the demographic and racial patterns of students in a particular neighborhood do not violate the EPC absent a showing that the imbalance was brought by state actors.</td>
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<tr>
<td>Uniontown Area School District v. Pennsylvania Human Relations Commission</td>
<td>1973</td>
<td>Supreme Court of Pennsylvania</td>
<td>Education</td>
<td>Pennsylvania can deal with de facto segregation as a matter of state law. Therefore, the Pennsylvania Human Rights Commission has the power to define de facto segregation.</td>
</tr>
<tr>
<td>Pennsylvania Human Relations Commission v. Chester Housing Authority</td>
<td>1974</td>
<td>Supreme Court of Pennsylvania</td>
<td>Housing/ Education</td>
<td>The court ordered that the Chester Housing Authority cease and desist from segregating the public housing projects. The court also required the Housing Authority to work with the Chester School District to draft a plan to correlate the placement of tenants with school age children to facilitate the desegregation of the school district.</td>
</tr>
<tr>
<td>Milliken v. Bradley</td>
<td>1974</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>Found that it was improper to impose a multidistrict remedy for de jure segregation in Detroit, Michigan absent a finding that the suburban districts engaged in de jure racial segregation.</td>
</tr>
<tr>
<td>Southern Burlington NAACP v. Township of Mount Laurel</td>
<td>1975</td>
<td>Supreme Court of New Jersey</td>
<td>Zoning</td>
<td>Held unconstitutional a zoning ordinance issued by an affluent suburban municipality that excluded almost all low-to moderate-income individuals from obtaining housing by failing to provide a fair share of housing of multifamily housing.</td>
</tr>
<tr>
<td>Township of Willistown v. Chesterdale Farms, Inc.</td>
<td>1975</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>The court held that municipalities cannot prohibit newcomers from moving into their districts, by failing to provide a fair share of township acreage for multifamily housing. The definition of exclusionary does not just mean a total prohibition of multi-family homes, but it expands to include partial exclusion, specifically if the primary purpose or the ordinance is to prevent entrance of newcomers.</td>
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<tr>
<td>Pennsylvania Human Relations Commission v.</td>
<td>1975</td>
<td>Supreme Court of Pennsylvania</td>
<td>Education</td>
<td>Held that Pennsylvania Human Relations Commission’s definition of a desegregated school and its other recommendations and guidelines are not regulations but statements of policy.</td>
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<tr>
<td>Norristown Area School District</td>
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<tr>
<td>Pennsylvania Human Relations Commission v.</td>
<td>1975-1996</td>
<td>Supreme Court of Pennsylvania</td>
<td>Education</td>
<td>The PHRC required Pittsburgh to desegregate its school district in an extended legal battle that lasted until 1996. In 1979, by threat of state takeover, the district submitted a plan that relied on magnet schools, which was designed to attract students throughout the city, to desegregate. Even though the PHRC rejected the plan, the court allowed the plan to be implemented (Chandler, et. al. 1997). The magnet school was expanded to include racial quotas. However, by the end of the 1980s, a declining tax base caused budgetary problems that placed busing in serious jeopardy in light of calls pushing for a return to geographically bounded neighborhood schools. In 1996, the legislature passed a bill to prevent the PHRC from forcing schools to bus and limited when courts could propose busing as a remedy to desegregate.</td>
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<tr>
<td>School District of Pittsburgh</td>
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<tr>
<td>Hills v. Gautreaux</td>
<td>1976</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>A federal court may order an area-wide remedy in a metropolitan area that extends to the suburbs, in cases where HUD knowingly funds a racially discriminatory city housing authority. This case led to the Gautreaux program in Chicago, which measured the educational and social effects of placing public housing in affluent, majority White communities for Black students</td>
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<tr>
<td><strong>Surrick v. Zoning</strong>&lt;br&gt;Hearing Board of Upper Providence Township,**</td>
<td>1977</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>To determine whether zoning ordinances comply with the fair share doctrine, the Court must determine: 1.) Is the Community a logical place for development and growth? 2.) Is the community already highly developed? and 3.) Is the exclusion total or partial.</td>
</tr>
<tr>
<td><strong>'Mt. Laurel II</strong></td>
<td>1983</td>
<td>Supreme Court of New Jersey</td>
<td>Zoning</td>
<td>Initiated the creation of a statewide Council on Affordable Housing Agency (COAH). COAH required every municipality to develop a fair share of affordable housing. This fair share policy encourages developers to develop fair housing by providing incentives to set aside a share of the units for low-to-moderate income families.</td>
</tr>
<tr>
<td><strong>Fernley v. Board of Supervisors</strong></td>
<td>1985</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>The fair share analysis does not apply when a zoning ordinance unconstitutionally bans all multifamily housing.</td>
</tr>
<tr>
<td><strong>Oklahoma v. Dowell</strong></td>
<td>1991</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>The Court began to withdraw District Court oversight in segregated school districts that historically practiced de jure segregation.</td>
</tr>
<tr>
<td><strong>Freeman v. Pitts</strong></td>
<td>1992</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>The Court began to withdraw District Court oversight in segregated school districts that historically practiced de jure segregation. The Court attributed existing school segregation in DeKalb County, Georgia on demographic shifts, “de facto” segregation, holding that the school districts put forth a good faith effort in creating a unitary system.</td>
</tr>
<tr>
<td><strong>BAC, Inc. v. Board of Supervisors</strong></td>
<td>1993</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>The Pennsylvania Supreme Court clarified that the previous line of fair share cases was based upon the constitutional right of property owners to own and enjoy property; therefore, the exclusion of classes of people was not relevant.</td>
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<tr>
<td><em>Precision Equities, Inc. v. Franklin Park Borough</em></td>
<td>1994</td>
<td>Commonwealth Court of Pennsylvania</td>
<td>Zoning</td>
<td>Municipalities are only required to provide a fair share of housing types. They are not required to provide a range of lot sizes for single-family housing.</td>
</tr>
<tr>
<td><em>Grutter v. Bollinger</em></td>
<td>2003</td>
<td>US Supreme Court</td>
<td>Education</td>
<td>The Equal Protection Clause does not bar the law school’s narrowly tailored use of race in admission decisions. A diverse student body is recognized as a compelling interest for higher education institutions.</td>
</tr>
<tr>
<td><em>Heritage Building Group, Inc., v. Plumstead Township</em></td>
<td>2003</td>
<td>Commonwealth Court of Pennsylvania</td>
<td>Zoning</td>
<td>The court made clear that New Jersey’s Mt. Laurel decision was not the law in Pennsylvania. Pennsylvania “municipalities are only required to zone for all uses, not for all income classes of people” (p. 21). The Pennsylvania Municipality Planning Code does not require affordable multi-family housing.</td>
</tr>
<tr>
<td><em>re Petition of Dolington Land Group</em></td>
<td>2003</td>
<td>Supreme Court of Pennsylvania</td>
<td>Zoning</td>
<td>The court noted that developed land had increased even though population growth had not. The court held that these priorities could justify a municipality’s decision to restrict development based on density, type, and location of housing.</td>
</tr>
<tr>
<td><em>McGlawn v. Pennsylvania Human Relations Commission</em></td>
<td>2006</td>
<td>Commonwealth Court of Pennsylvania</td>
<td>Zoning</td>
<td>Held that reverse redlining, the practice of extending credit on unfair terms to specific geographic areas due to income, race or ethnicity is a recognized cause of action that violates the PHRA.</td>
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<td>Parents Involved in Community Schools v. Seattle School District No. 1</td>
<td>2007</td>
<td>US Supreme Court (plurality)</td>
<td>Education</td>
<td>The Court struck down voluntary integration plans, which relied on racial classifications to integrate de facto segregated schools in Seattle, Washington and Jefferson County, Kentucky. Chief Justice Roberts concluded that the neighborhoods in Louisville and Seattle remained segregated due to private choices</td>
</tr>
<tr>
<td>Doe v. Lower Merion School District</td>
<td>2011</td>
<td>3rd Circuit U.S. Court of Appeals</td>
<td>Education</td>
<td>Lower Merion School District redistricted their school boundaries to equalize student enrollment between their two high schools. The NAACP and Black students sued the school district, alleging that the district violated the Equal Protection Clause of the 14th Amendment, Title VI of the Civil Rights Act, by targeting students for redistricting based on race. Harriton High School, located in the western district pulled less students and less minority students than Lower Merion High School, so the school district decided to re-draw the lines where some students who lived closer (walking distance) to Lower Merion High School would have to attend Harriton High School (Cook, 2008). This plan disproportionately impacted the neighborhoods of South Ardmore and North Ardmore, which had the highest concentration of Black students in the district, forcing these students to be bussed across the district even though they could walk to Lower Merion High School. The 3rd Circuit held that the plan is neutral on its face and therefore constitutional, because Lower Merion assigned students based upon geographical area in which they lived.</td>
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<tr>
<td><strong>Blunt v. Lower Merion School District</strong>,</td>
<td>2014</td>
<td>3rd Circuit U.S. Court of Appeals</td>
<td>Education</td>
<td>The court held that even though statistical evidence shows that minorities are overrepresented in low achievement classes, “there is no genuine issue of material fact concerning Lower Merion’s intent to discriminate”</td>
</tr>
<tr>
<td><strong>Schuette v. Coalition to Defend Affirmative Action</strong></td>
<td>2014</td>
<td>US Supreme Court (plurality)</td>
<td>Public Accommodations</td>
<td>The Court held that voters of a state can choose to prohibit the use of race in governmental decisions such as school affirmative action decisions.</td>
</tr>
<tr>
<td><strong>Texas Department of Housing and Community Affairs (TDHCA) v. The Inclusive Communities Project, Inc. (ICP)</strong></td>
<td>2015</td>
<td>US Supreme Court</td>
<td>Zoning</td>
<td>The use of a disparate impact claim is constitutional under the Fair Housing Act of 1968.</td>
</tr>
</tbody>
</table>
Appendix B

Interview Protocol

Level 1: Questions asked of specific interviewees (VERBAL LINE OF INQUIRY) (Yin, 2014).

Housing:
- How long have you been living/working in Montgomery County, Cheltenham Township, Lower Merion Township, Narberth Borough?
- Why did you choose to live/work in…?
- Can you give me a brief history of the region?
- Can you provide me some community/ geographic information?
- What are the major housing / township issues?
- Why do you think this area has been able to maintain its affluence over time (Lower Merion)?
- Why do you think that this area became increasingly diverse with high rates of minority and low-income populations (Cheltenham)?
- What are the major benefits/problems in living/working within this municipality?
- What are other resources/ groups/ people that would be great to interview regarding these areas?
- What maintains the segregation between these areas?

Education:
- How long have you been living/working in (Cheltenham SD, Lower Merion SD)?
- Why did you choose to live/work in (Cheltenham SD, Lower Merion SD)?
- Can you give me a brief history of the school district?
- Can you provide me some community/ geographic information regarding (Cheltenham SD, Lower Merion SD)?
- What are the major school district issues and policies of ________?
- Why do you think this area has been able to maintain its affluence (Lower Merion)?
- Why do you think that this area became increasingly diverse with minority and low-income populations (Cheltenham)?
- What are the major benefits/problems in living/working within this municipality?
- What are other resources/ groups/ people that would be great to interview regarding these areas?
- What maintains the segregation between these areas?
Appendix C

Sample Recruitment Script

Mock E-mail to Major interviewees and organizations

To Whom It May Concern:

Hello, my name is Heather Bennett. I am a PhD candidate in the Department of Education Policy at the Pennsylvania State University. My research focuses on the intersection of education, law, and policy in K-12 public schools. Specifically, focusing on legal issues related to school and residential segregation. For my dissertation, I am currently conducting a case study regarding the research question: How does housing and school policy function together to impact the racial and economic segregation between two school districts (Lower Merion and Cheltenham School District) within Montgomery County, Pennsylvania?

This e-mail is directed to community leaders, school leaders, and governmental officials to ask if you are available for an interview regarding your expertise on housing and/or school policy in Montgomery County (Lower Merion School District, Lower Merion Township, Narberth Borough, Cheltenham Township, Cheltenham School District). I thank you so much for your time, and for your assistance.
Appendix D

Abbreviations on Key Terms

Advance Placement (AP)
American Community Survey (ACS)
Analysis of Impediments to Fair Housing (AI)
Civil Rights Data Center (CRDC)
Cheltenham School District (CSD)
Cheltenham Township (CT)
Community Block Development Grant (CBDG)
Community Development Block Grant (CDBG)
Community Planning and Development Plan (CPD)
Consolidated Annual Performance and Evaluation Report (CAPER)
Federal Housing Administration (FHA)
Fourteenth Amendment Equal Protection Clause (EPC)
Free and Reduced Price Lunch (FRPL)
International Baccalaureate (IB)
Lower Merion Affordable Housing Corporation (LMAHC)
Lower Merion School District (LMSD)
Lower Merion Township (LMT)
Median Household Income (MHI)
Montgomery County, Pennsylvania (MC)
Moving to Opportunity (MTO)


National Center for Educational Statistics’ Common Core of Data Public School Universe NCES (NCES)

Narberth Borough (NB)

Pennsylvania Department of Education (PDE)

Pennsylvania Human Relations Act (PHRA) (1955)

Pennsylvania Human Relations Commission (PHRC)

Office of Management Budget (OMB)

U.S. Department of Housing and Urban Development (HUD)

U.S. Department of Justice (DOJ)

U.S. Department of Education (DOE)

Veterans Administration (VA)
VITA

Heather N. Bennett Esq.

EDUCATION
2017  PhD, Education Leadership, The Pennsylvania State University.

BAR ADMISSION
2014  State of New Jersey
2013  Commonwealth of Pennsylvania

HONORS AND AWARDS
One more Award
2014  Barbara Jackson Scholars
2011  CALI Excellence for the Future Award in the study of Property

SELECTED PUBLICATIONS AND PROGRAMS


