

SECTION 2

COMMUNITY ANALYSIS

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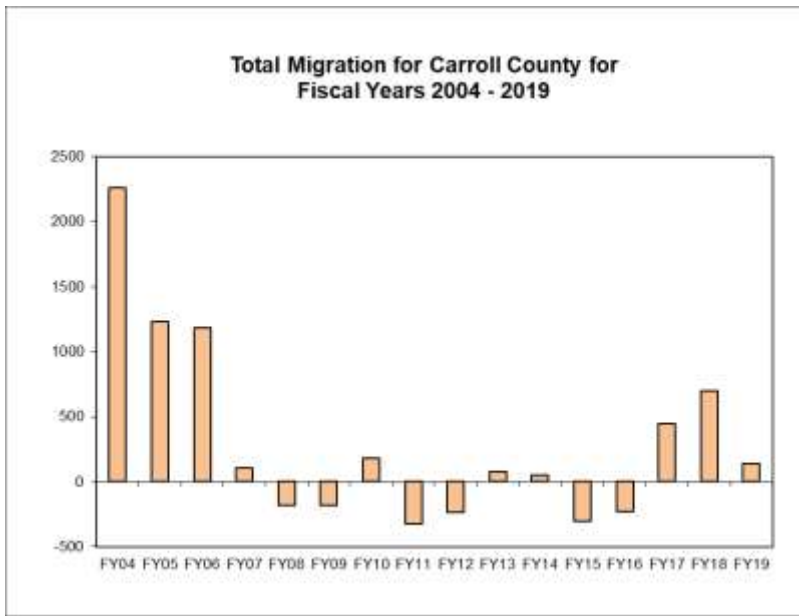
One of the central purposes of this plan is to ensure that there are adequate school facilities to accommodate the public school enrollment for Carroll County. Public School enrollments are influenced by the County's demographic trends over time. As the County's population experienced rapid expansion in past decades, public school enrollment also experienced rapid growth. Due to this rapid increase in enrollments, fourteen new schools and several school additions were constructed between 1990 and 2010. As the County's population growth has slowed dramatically since 2005, public school enrollment has declined due to fewer new students entering the school system. Due to this decline, three schools were closed in 2015. Although there are signs that the rate of population growth may be starting to grow again, it is very unlikely that growth in the next ten years will be as rapid as it was in previous decades. It is more likely that county population growth, and subsequently public school enrollment growth, will gradually increase over the coming decade.

POPULATION

According to the 2010 Census, there were 167,134 people and 59,786 households in Carroll County. This was a 10.8% increase in population from the 2000 Census. This represents the smallest percentage growth since the 8.5% growth experienced from 1930 to 1940. This is dramatically different from the high rates of growth experienced over the last four decades. The 2019 Census population estimate for Carroll was 168,447. This represents a 0.8% increase from the 2010 Census population of 167,134. This indicates that the population of Carroll since 2010 has experience little to no growth.

Year	Carroll County	Percent Growth
1930	35,978	
1940	39,054	8.5%
1950	44,907	15.0%
1960	52,785	17.5%
1970	69,006	30.7%
1980	96,356	39.6%
1990	123,372	28.0%
2000	150,897	22.3%
2010	167,134	10.8%

Domestic migration was historically been the driving force behind Carroll County's rapid population growth. However, domestic migration into the County has essentially stopped being a factor. According to the Maryland Department of Planning, the net domestic migration for the County since 2010 has averaged a gain of 35 residents per year.



Some of this slow down can be attributed to the 2008 housing market crash and the lack of demand for new housing. Another major factor behind the slowdown that began in 2006 has been the changing environmental requirements placed on County jurisdictions. Just prior to the housing market crash, the Maryland Department of Environment changed the formula for calculating public ground water appropriations. As a result, several municipalities have experienced challenges to find sufficient water capacity to support existing and planned growth. Since most municipalities within the county rely on groundwater to serve growth, these municipalities will continue to face challenges in order to grow at the rates historically seen prior to 2006.

In addition to the changing rate of population growth occurring in the county, the composition of the population is also changing. According to the 2010 Census, the median age of Carroll County is now 41.1 years old. This is the seventh highest median age in Maryland, and is the highest of all of the counties in Central Maryland. Only Worcester, Kent, and Garrett counties experienced a greater increase than Carroll's 4.2 increase in median age over the last decade. The aging in place of the population and the out migration of younger population are both key components to the rising median age for Carroll County. According to the 2010 Census, persons over 60 now represent 19% of the population (an increase of 4.5% compared to 2000 Census numbers) and persons 20 to 39, which are the prime years for starting a family, make up 21% of the population (a decrease of almost 5% compared to 2000 Census numbers).

Population by Age Group, 2000 and 2010

Age Group	2000	% of Population	2010	% of Population	% Change, 1990 - 2000
80+	4,317	2.9%	6,208	3.7%	44%
70 to 79	7,544	5.0%	8,494	5.1%	13%
60 to 69	9,909	6.6%	16,859	10.1%	70%
50 to 59	18,585	12.3%	25,624	15.3%	38%
40 to 49	26,050	17.3%	29,270	17.5%	12%
30 to 39	25,010	16.6%	17,691	10.6%	-29%
20 to 29	13,859	9.2%	17,234	10.3%	24%
10 to 19	23,298	15.4%	25,290	15.1%	9%
0 to 9	22,325	14.8%	20,464	12.2%	-8%
Total	150,897	-	167,134	-	11%

Along with the aging of the population, there is also a trend toward smaller household sizes. The average household size in Carroll County has been declining steadily over the past several decades. The average household size went from 2.81 in 2000, down to 2.74 in 2010. This decline in household size can be attributed to the fact that families are having fewer children, there are more single-parent families, there are more single-person households, and people are living longer thus creating more single and two-person elderly households. Although the average household size in the county is declining, it should be noted that the county’s average household size of 2.74 persons per household was the highest of all the Central Maryland counties. A major reason for this is that Carroll has one of the highest percentages (27.3%) of households that are married-couple families with children, and the lowest percentage (19.7%) of single parent households in the State.

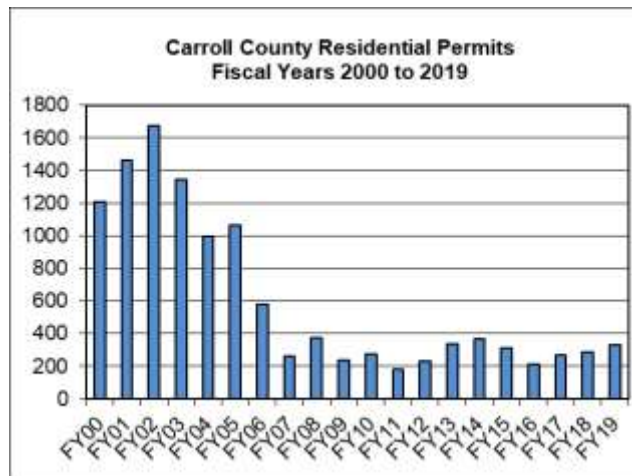
Based on the 2010 Census, Carroll County still has a very homogeneous population. However, the share of the total population consisting of minority races is increasing. The percent of total population consisting of minority races has gone from 4.3% in 2000 to 7.1% in 2010.

Carroll County Population by Race, 1970 -2010

Year	White	% of Total Population	Black	% of Total Population	Other Races	% of Total Population	Total Population
1970	66,170	95.9%	2,736	4.0%	100	0.1%	69,006
1980	92,818	96.3%	2,840	2.9%	698	0.7%	96,356
1990	119,336	96.7%	2,933	2.4%	1,103	0.9%	123,372
2000	144,399	95.7%	3,433	2.3%	3,065	2.0%	150,897
2010	155,282	92.9%	5,332	3.2%	6,520	3.9%	167,134

HOUSING

The rapid population growth experienced by Carroll County over the last several decades was largely due to people moving out of more urban jurisdictions in a wave of suburban expansion. This wave of growth was driven by cheaper residentially zoned land. Due to Carroll County’s rural landscape, low crime rates, and reputation for good schools the demand for new housing in Carroll County was high. However, two events occurred between 2005 and 2010 to restrict residential growth in the County. The first event was that the Maryland Department of the Environment changing the way it calculated how much water could be appropriated for public ground water permits. Since most of the municipalities in Carroll County rely on ground water wells for their water supply, this change has limited their ability to accommodate planned growth. The second event was the collapse of the residential housing market. Driven by historically low interest rates, the early part of the last decade saw a rapid escalation of home values. This created an artificially high demand for new homes. However, due to rising mortgage defaults and foreclosures in 2008 this housing market bubble burst. Both of these events were major factors in the dramatic slowdown in building permits since 2005.



Recent real estate data indicate that the housing market has recovered and housing demand is very strong. However, the lack of ground water supply available to growth areas in the County continues to present an obstacle to new residential growth. As a result, most of the current volume in Carroll is being driven by existing home sales. Since most of the past population growth was driven by new home sales, it is still unclear if increases in existing home sales will translate into increased population growth or not.

Real Estate Trend Indicators 2017 - 2020				
	2017	2018	2019	2020
Total Sold Dollar Value	\$810,234,187	\$820,481,230	\$847,136,760	\$1,064,193,636
Average Sold Price	\$326,707	\$337,925	\$347,469	\$380,253
Median Sold Price	\$308,250	\$319,000	\$325,000	\$355,000
Total Units Sold	2,480	2,428	2,423	2,800
Average Days on Market	82	71	43	35
Average List Price	330,681	342,700	351,072	381,230
Avg. Sales Price as a Percentage of Avg. List Price	97.2%	97.6%	97.2%	99.0%

EMPLOYMENT

According to the Maryland Department of Labor, Licensing, and Regulations (MDLLR), Carroll County's December 2020 total labor force of 90,978 made up approximately 3% of Maryland's total labor force. Statistics from the 2000 Census indicate that more than half (55%) of workers living here commuted to jobs outside the county. The large number of workers commuting to jobs outside the county indicates that Carroll is a desirable place to live but it does not have the types of business and industry to provide jobs for all of its residents. Unless the County sees an expansion in the number and types of business, it will continue to be more of a bedroom community.

According to the 2019 Employment and Payrolls report from MDLLR, private sector jobs in the county accounted for 86% of the total employment for Carroll County, while government sector jobs made up the remaining 14%. Jobs in the Service Providing industry group made up the largest percentage of total employment for both Carroll County (68.6%), and the State of Maryland (71.3%).

Employment Distribution by Industry Group 2019				
Industry Group	Carroll County	Percent of Total Employment	Maryland	Percent of Total Employment
<i>Goods-Producing</i>	<i>10,532</i>	<i>18.0%</i>	<i>285,341</i>	<i>10.6%</i>
Natural Resources and Mining	521	0.9%	7,189	0.3%
Construction	6,071	10.4%	165,865	6.1%
Manufacturing	3,939	6.7%	112,287	4.2%
<i>Service Providing</i>	<i>39,823</i>	<i>68.0%</i>	<i>1,924,929</i>	<i>71.3%</i>
Trade, Transportation, and Utilities	11,955	20.4%	463,519	17.2%
Information	262	0.4%	35,309	1.3%
Financial Activities	1,558	2.7%	135,150	5.0%
Professional and Business Services	5,993	10.2%	462,824	17.1%
Education and Health Services	10,522	18.0%	450,492	16.7%
Leisure and Hospitality	7,315	12.5%	52,853	2.0%
Other Services	2,216	3.8%	94,842	3.5%
<i>Unclassified</i>	<i>0</i>	<i>0.0%</i>	<i>30</i>	<i>0.0%</i>
Private Sector Total - All Industries	50,356	86.0%	2,210,301	81.9%
<i>Federal Government</i>	<i>345</i>	<i>0.6%</i>	<i>145,695</i>	<i>5.4%</i>
<i>State Government</i>	<i>1,255</i>	<i>2.1%</i>	<i>99,127</i>	<i>3.7%</i>
<i>Local Government</i>	<i>6,564</i>	<i>11.2%</i>	<i>245,253</i>	<i>9.1%</i>
Government Sector - Total	8,164	14.0%	490,076	18.1%
Total Employment	58,521	100.0%	2,700,377	100.0%

Note: The data include all wage and salary workers covered by unemployment insurance. Not included are self-employed, agricultural, railroad, military, and some religious organization employees. These data pertain to people who work in the jurisdiction rather than those who live in the jurisdiction.

CARROLL COUNTY MASTER PLAN

The Carroll County Board of Commissioners adopted the 2014 County Master Plan on February 26, 2015. This plan is the second revision to the original 1964 Master Plan. The adopted plan reflects the choices of the citizens to reaffirm support of the direction dictated by the original Carroll County Master Plan. The basic premise of the plan is that development should be directed into and around the County's nine Designated Growth Areas (DGAs) while preserving the rural character of the surrounding land. These DGAs are generally centered around municipalities which have historically seen higher density development due to the availability of public water and public sewer facilities. The DGAs identified in the plan are: Finksburg, Freedom, Hampstead, Manchester, Mount Airy, New Windsor, Taneytown, Union Bridge, and Westminster.

In order to provide more detailed plans for these designated growth areas, the County and/or municipality have developed community comprehensive plans. The following is a list of the current adopted community comprehensive plans and the year they were adopted:

County Adopted Community Plans

Plan	Year Adopted
Finksburg Corridor Plan	2013
Freedom Community Comprehensive Plan	2018

Municipal Adopted Community Plans

Plan	Year Adopted
Town of Mt. Airy Master Plan	2013
Union Bridge Community Comprehensive Plan	2014
Manchester Comprehensive Plan	2009
City of Westminster Comprehensive Plan	2009
Hampstead Community Comprehensive Plan	2017
New Windsor Community Comprehensive Plan	2010
Taneytown Community Comprehensive Plan	2010
Town of Sykesville Master Plan	2011

One of the main goals of the Carroll County Master Plan is to “Pursue policies and Capital Improvement expenditures that facilitate growth in the designated growth areas, thereby protecting and conserving agricultural and environmental resource areas, preserving open space, and providing public facilities and services efficiently and cost effectively”. Although there are a few schools that are located outside the DGAs, the majority of schools are located within the DGAs. The schools that are located outside of the growth areas are older schools that are necessary to serve the rural areas located between DGAs.

FREEDOM DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Carrolltowne Elementary	Yes	Yes	Yes
Century High	Yes	Yes	Yes
Eldersburg Elementary	Yes	Yes	Yes
Freedom Elementary	Yes	Yes	Yes
Liberty High	Yes	Yes	Yes
Linton Springs Elementary	Yes	Yes	Yes
Oklahoma Road Middle	Yes	Yes	Yes
Piney Ridge Elementary	Yes	Yes	Yes
Sykesville Middle	Yes	Yes	Yes
HAMPSTEAD DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Hampstead Elementary	Yes	Yes	Yes
North Carroll Middle	Yes	Yes	Yes
Shiloh Middle	Yes	Yes	Yes
Spring Garden Elementary	Yes	Yes	Yes
MANCHESTER DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Ebb Valley Elementary	Yes	Yes	Yes
Manchester Elementary	Yes	Yes	Yes
Manchester Valley High	Yes	Yes	Yes
MT. AIRY DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Mt. Airy Elementary	Yes	Yes	Yes
Mt. Airy Middle	Yes	Yes	Yes
Parr's Ridge Elementary	Yes	Yes	Yes
NEW WINDSOR DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
TANEYTOWN DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Northwest Middle	Yes	Yes	Yes
Taneytown Elementary	Yes	Yes	Yes
UNION BRIDGE DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Elmer Wolfe Elementary	Yes	Yes	Yes

WESTMINSTER DESIGNATED GROWTH AREA			
SCHOOLS	PFA	Public Water	Public Sewer
Career & Technology Center	Yes	Yes	Yes
Carroll Springs	Yes	Yes	Yes
Cranberry Station Elementary	Yes	Yes	Yes
Friendship Valley Elementary	Yes	Yes	Yes
Robert Moton Elementary	Yes	Yes	Yes
Westminster East Middle	Yes	Yes	Yes
Westminster Elementary	Yes	Yes	Yes
Westminster High	Yes	Yes	Yes
Westminster West Middle	Yes	Yes	Yes
William Winchester Elementary	Yes	Yes	Yes
Winters Mill High	Yes	Yes	Yes
OUTSIDE DESIGNATED GROWTH AREAS			
SCHOOLS	PFA	Water	Sewer
Francis Scott Key High	Rural Village	Public	Public
Mechanicsville Elementary	Rural Village	Onsite	Onsite
Runnymede Elementary	no	Onsite	Onsite
Sandymount Elementary	no	Onsite	Onsite
South Carroll High	Rural Village	Onsite	Onsite*
Winfield Elementary	Rural Village	Onsite	Onsite*
* Schools are served by County operated sewage treatment facility on South Carroll's property			

Based on the County's past and current master plan, there is an expectation that future growth will occur in and around these growth areas. In order to ensure that land would be available for the construction of schools if necessary, the County worked to acquire several school sites over time in areas where growth was expected to occur. All but one of these acquired sites are located within a DGA and have access to public water and sewer.

FUTURE SCHOOL SITES					
Property Name	Acres	DGA	PFA	Water	Sewer
Cape Horn Park	60	Manchester	Yes	Public	Public
Friendship Valley ES Fields	26	Westminster	Yes	Public	Public
Mayeski Park	30	N/A	Rural Village	Private	Private

CONCURRENCY MANAGEMENT AND ADEQUATE PUBLIC FACILITIES

The Concurrency Management and Adequate Public Facilities Ordinance is the tool that the county utilizes to coordinate subdivision approvals with the availability of public facilities. For all major subdivisions, the ordinance requires that an Adequate Threshold Capacity for all years in the current 6-year Community Investment Program (CIP) be determined for schools, roads, police, fire and emergency services, and water and sewer services. The ordinance establishes three categories: Inadequate, Approaching Inadequate, and Adequate. A school is determined to be inadequate if the utilization percentage is over 120% of the State Rated Capacity for elementary and high schools, and over 120% of functional capacity for middle schools. Any subdivision located in a school attendance boundary that is determined to be inadequate will be placed in a development queue. Projects in the queue will be reevaluated annually and released for approval when capacity is available. A school is determined to be approaching inadequate if the utilization percentage is between 110% and 119% of the State Rated Capacity for elementary and high schools, and between 110% and 119% of the Functional Capacity for middle schools. A subdivision located in a school attendance boundary that is determined to be approaching inadequate may have a phasing plan developed. This authority resides with the Carroll County Planning and Zoning Commission. A school is determined to be adequate if the utilization percentage is below 110% of State Rated Capacity for elementary and high schools, and below 110% of Functional Capacity for middle schools. Projects located within a school attendance boundary that is determined to be adequate have no restrictions on their approval.

This ordinance has been rewritten several times as the rapid growth often overwhelmed the county's public infrastructure. The current ordinance was rewritten in 2004 during a development deferral enacted by the County Commissioners. Since this new ordinance has been in place, growth in the county has dramatically declined. This slow down in new growth has reduced the number of schools which are considered inadequate based on the Concurrency Management and Adequate Public Facilities Ordinance.

Using the 2021-2022 to 2030-2031 Enrollment Projections and the criteria contained in the Concurrency Management and Adequate Public Facilities Ordinance the following schools are, or will be considered inadequate or approaching inadequate at some point within the next six fiscal years:

Inadequate (120% and greater of Capacity)

Freedom Elementary	2021-2026
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Approaching Inadequate (110% to 119% of Capacity)

Carrolltowne Elementary	2024-2026
Oklahoma Road Middle	2026
Sykesville Middle	2025-2026