

SECTION 2
COMMUNITY ANALYSIS

COMMUNITY ANALYSIS

Carroll County is located in the central portion of Maryland between Frederick County on the west and Baltimore County on the east. The Mason-Dixon Line is the northern boundary line, while the Patapsco River forms its southern boundary line. There are eight incorporated municipalities located with the county including: Hampstead, Manchester, Mount Airy (part of which is also in Frederick County), New Windsor, Sykesville, Taneytown, Union Bridge, and Westminster. Carroll County consists of 456 square miles located on the edge of the Baltimore and Washington D.C. metropolitan areas. The rapid population growth that Carroll County has experienced over the last few decades is a direct result of this proximity.

POPULATION

As of December 2008, there were an estimated 174,650 people and 60,961 households in Carroll County. This represents a 0.5% increase over the 2007 population estimates. This represents the smallest gain this decade, and is the smallest percent growth since prior to 1980. The decline from rapid growth earlier this decade has been dramatic. The County gained over 7,800 residents in 2002 and 2003 which was the highest two-year total since 1969. As a result of concerns about adequate public facilities, the County imposed a development moratorium from mid-2003 to mid-2004 in order to revise the Concurrency Management and Adequate Public Facilities Ordinance. This new ordinance, along with the lack of available ground water for most of the municipal growth areas, is the main reason behind the County's slowdown. Maryland's increase of 14,700 people from 2007 to 2008 is also the smallest gain this decade, and also the smallest increase since 1980. Increased losses from net internal migration are causing the statewide slowdown.

Year	Carroll County	Percent Growth	Maryland	Percent Growth
2000	153,434		5,310,916	
2001	157,570	2.7%	5,374,956	1.2%
2002	161,808	2.7%	5,433,822	1.1%
2003	165,052	2.0%	5,494,136	1.1%
2004	167,546	1.5%	5,537,662	0.8%
2005	170,301	1.6%	5,573,163	0.6%
2006	172,641	1.4%	5,602,017	0.5%
2007	173,839	0.7%	5,618,344	0.3%
2008	174,650	0.5%	5,633,044	0.3%

There are two causes of population growth: natural increase and net migration. Natural increase is the difference between the amount of births and the amount of deaths in the county. Net migration is the difference between the amount of people moving into the county and the amount of people leaving the county. Net migration has been the driving force behind Carroll County's rapid population growth since the 1960's. However, due to the fact that new home construction has been drastically curtailed due to the lack of adequate public facilities the County is no longer seeing large gains from net internal migration. According to the Maryland Department of Planning, the net internal migration for the County has gone from a peak gain of nearly 3,500 residents in 2001/2002 to net outflows of (-54) and (-233) in 2007 and 2008.

In addition to the changing rate of population growth occurring in the county, the composition of the population is also changing. The aging of the “baby boom” generation is changing the age structure of Carroll County. According to the 2000 census, the largest age cohort was people in their forties. As this age group moves into their fifties, (this decade) and their sixties (the next decade), there will be a significant increase in the already expanding elderly population. People ages 20 to 29 are now the smallest age group under the age of 60. The small size of the “twenty-something” age group reduces the entry-level workforce and lowers the rate of new household formation among current county residents.

Population by Age Group, 1990 and 2000

Age Group	1990	% of Population	2000	% of Population	% Change, 1990 - 2000
80+	3,013	2.4%	4,317	2.9%	43%
70 to 79	5,423	4.4%	7,544	5.0%	39%
60 to 69	8,642	7.0%	9,909	6.6%	15%
50 to 59	10,738	8.7%	18,585	12.3%	73%
40 to 49	19,051	15.4%	26,050	17.3%	37%
30 to 39	22,288	18.1%	25,010	16.6%	12%
20 to 29	17,783	14.4%	13,859	9.2%	-22%
10 to 19	17,057	13.8%	23,298	15.4%	37%
0 to 9	19,377	15.7%	22,325	14.8%	15%
Total	123,372	-	150,897	-	22%

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. 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 2.81 persons per household in 2000 was higher than Maryland’s 2.61 persons per household and significantly higher than some of the urban jurisdictions within the Baltimore Region.

Carroll County Household Size Distribution - 1990 and 2000

Household Size (Persons)	Households 1990	% of Households 1990	Households 2000	% of Households 2000	% Change 1990 - 2000
1	6,720	15.9%	9,187	17.5%	36.7%
2	12,975	30.7%	17,114	32.6%	31.9%
3	8,991	21.3%	9,983	19.0%	11.0%
4	8,759	20.7%	10,000	19.0%	14.2%
5	3,457	8.2%	4,368	8.3%	26.4%
6 or more	1,311	3.1%	1,851	3.5%	41.2%
Total	42,213	-	52,503	-	24.4%

Although Carroll County still has a very homogeneous population based on July 1, 2008 Census Department data, the percentage of total population made up by the white population is declining. As a result 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 6.8% in 2008.

Carroll County Population by Race, 1970 -2008

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
2008	157,777	93.2%	6,775	4.0%	4,801	2.8%	169,353

HOUSING

According to the 2000 Census, 78 % of the housing units located within Carroll County were single-family detached houses. Single-family attached units, which consist of townhouses and duplexes, made up 9% of the housing stock. Multi-family units, or apartments, made up 12% of the stock. The remaining 1% of the housing stock was made up of mobile homes, boats, RV's, vans and any other housing type that did not fit into the other categories. Compared to other counties located within the region, Carroll County had the highest percentage of single-family detached housing and the lowest percentages of single-family attached and multi-family housing.

2000 Housing Units by Type for Regional Jurisdictions

Jurisdiction	Single-Family Detached	Percent	Single-Family Attached	Percent	Multi-Family	Percent	Total*
Anne Arundel	119,626	64.0%	32,333	17.3%	31074	16.6%	186,937
Baltimore City	40,166	13.4%	155,563	51.8%	104531	34.8%	300,477
Baltimore County	147,499	47.0%	76,784	24.5%	86882	27.7%	313,734
Carroll County	42,272	77.9%	4,727	8.7%	6569	12.1%	54,247
Frederick County	47,498	65.1%	12,985	17.8%	11813	16.2%	73,017
Harford County	51,187	61.6%	15,107	18.2%	13616	16.4%	83,146
Howard County	49,894	53.8%	19,419	20.9%	21664	23.3%	92,818
Montgomery County	171,277	51.2%	59,951	17.9%	102779	30.7%	334,632

As a result of having this high percentage of single-family detached housing, the county also has some of the highest housing prices in Maryland. According to the 2000 Census, the county's median value of \$163,300 for owner-occupied housing was the fourth highest value among all counties in the state. Only Montgomery (\$210,600), Howard (\$198,600), and Calvert (\$170,800) had higher values. Recent Metropolitan Regional Information Systems data indicates that home values have fallen significantly due to the nationwide economic downturn. The average sold price of a home in Carroll County dropped significantly over 10% from 2007 to 2008.

Real Estate Trend Indicators 2005 - 2008

	2005	2006	2007	2008
Total Sold Dollar Value	\$852,261,275	\$731,425,342	\$619,264,997	\$402,925,639
Average Sold Price	\$358,545	\$362,271	\$364,703	\$325,465
Median Sold Price	\$330,000	\$330,000	\$335,000	\$299,450
Total Units Sold	2,377	2,019	1,698	1,238
Average Days on Market	46	74	118	147
Average List Price	366,524	378,605	388,159	358,744
Avg. Sales Price as a Percentage of Avg. List Price	97.8%	95.7%	94.0%	90.7%

EMPLOYMENT

According to the Maryland Department of Labor, Licensing, and Regulations (MDLLR), Carroll County's 2008 total labor force of 94,705 made up approximately 3% of Maryland's total labor force. According to the 2000 census, 42,788 workers (55.1%) commuted to jobs outside the county, while 34,804 (44.9%) stayed in Carroll County for their jobs. Although the 2000 census did indicate that some people were commuting into the county for jobs, the large number of workers commuting to jobs outside the county indicates a discrepancy between the types of employment located in the County and the skill set of the County's labor force.

Although Carroll County has a small workforce compared to other counties in the region, there has been some significant job growth recently. According to the U.S. Bureau of Economic Analysis (BEA), the total number of non-farm jobs in Carroll County increased 31.5% during the 1990's, going from 51,062 in 1990 to 67,154 in 2000. This was almost three times the percentage of new job growth in Maryland during this same period. The Services sector experienced the greatest increase in employment, with a 52.3% increase during the 1990's. The Finance, Insurance, and Real Estate industry group saw the next highest increase, with a 49.1% gain between 1990 and 2000. Retail Trade also experience significant growth, with a 45.1% increase in employment. Manufacturing was the only industry group in the county to experience a loss, dropping 7.9% over this timeframe.

Employment by Industry Group, 1990 - 2000

Industry Group	1990 Employment	2000 Employment	Percent Change
Agricultural Services	1,071	(D)	-
Mining	22	(D)	-
Construction	7,226	8,797	21.7%
Manufacturing	6,647	6,119	-7.9%
Transportation and Public Utilities	1,626	2,204	35.5%
Wholesale Trade	3,028	3,355	10.8%
Retail Trade	8,993	13,051	45.1%
Finance, Insurance, Real Estate	3,103	4,626	49.1%
Services	13,040	19,856	52.3%
Government	6,306	7,469	18.4%
Total Non-farm Jobs	51,062	67,154	31.5%

(D) – Not shown to avoid disclosure of confidential information

According to the 2008 Employment and Payrolls report from MDLLR, private sector jobs in the county accounted for 85.1% of the total employment for Carroll County, while government sector jobs made up the remaining 14.9%. Jobs in the Service Providing industry group made up the largest percentage of total employment for both Carroll County (65.5%), and the State of Maryland (69.1%). Goods-Producing jobs made up a larger percent of the jobs in Carroll County than the statewide percentage. This is due to the fact that Construction and Manufacturing jobs make up a larger percentage of Carroll County's total employment than they do statewide.

Employment Distribution by Industry Group 2008

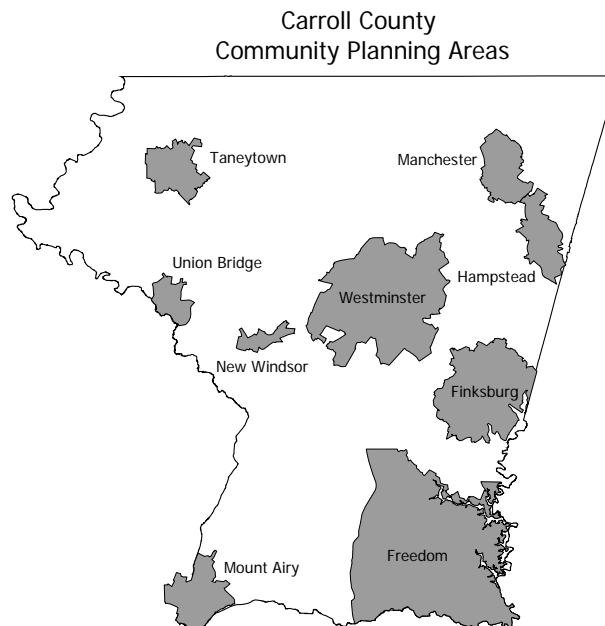
Industry Group	Carroll County	Percent of Total Employment	Maryland	Percent of Total Employment
<i>Goods-Producing</i>	<i>11,238</i>	<i>19.7%</i>	<i>313,044</i>	<i>12.3%</i>
Natural Resources and Mining	302	0.5%	6,528	0.3%
Construction	6,321	11.1%	178,076	7.0%
Manufacturing	4,615	8.1%	128,440	5.1%
<i>Service Providing</i>	<i>37,362</i>	<i>65.5%</i>	<i>1,753,071</i>	<i>69.1%</i>
Trade, Transportation, and Utilities	12,190	21.4%	461,249	18.2%
Information	508	0.9%	49,820	2.0%
Financial Activities	1,593	2.8%	149,220	5.9%
Professional and Business Services	5,946	10.4%	398,952	15.7%
Education and Health Services	8,938	15.7%	367,671	14.5%
Leisure and Hospitality	5,923	10.4%	236,048	9.3%
Other Services	2,264	4.0%	90,111	3.6%
<i>Unclassified</i>	<i>0</i>	<i>0.0%</i>	<i>876</i>	<i>0.0%</i>
Private Sector Total - All Industries	48,600	85.1%	2,066,991	81.5%
<i>Federal Government</i>	<i>326</i>	<i>0.6%</i>	<i>127,150</i>	<i>5.0%</i>
<i>State Government</i>	<i>1,274</i>	<i>2.2%</i>	<i>99,683</i>	<i>3.9%</i>
<i>Local Government</i>	<i>6,882</i>	<i>12.1%</i>	<i>243,576</i>	<i>9.6%</i>
Government Sector - Total	8,482	14.9%	470,409	18.5%
Total Employment	57,082	100.0%	2,537,400	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

Up until the late 1950's, Carroll County was basically a rural farming community interspersed with small towns and villages where trade, civic, and cultural activities took place. In 1959, realizing that growth was inevitable given the County's geographic location, the County Commissioners appointed the County's first Planning Commission. By 1964, the Planning Commission had completed studies and formulated the first Master Plan (also known as a comprehensive plan) for Carroll County, which, after public hearing, was adopted by the County Commissioners. In December 2000 the County Commissioners adopted revisions to the Master Plan for Carroll County, published in a volume titled *Carroll County Challenges and Choices: A Master Plan for the Future*. After several years in the making, the plan reflects the choices of the citizens to reaffirm support of the direction dictated by the original Carroll County Master Plan. The core planning principles of facilitating and encouraging higher density growth in designated planning areas, the vigorous pursuit of agricultural land preservation, protection of natural resources, and the timing and phasing of development and at a rate the county can afford to fund the new and improved facilities are all contained in this plan.

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". These designated growth areas are called Community Planning Areas (CPA's). There are currently nine CPA's in the county, eight of which include an incorporated municipality. The following map illustrates the location of these CPA's



In order to implement this goal and provide more detailed plans for these designated growth areas, the Carroll County Commissioners have adopted a series of Community Comprehensive Plans. The following is a list of the current adopted community comprehensive plans and the year they were adopted:

Finksburg Area and Environs*	1981
Taneytown and Environs*	1997
Manchester and Environs*	1998
Freedom Community*	2001
Hampstead Community*	2004
Mount Airy Environs Community	2006
New Windsor Community	2007
Westminster Environs Community	2007
Union Bridge and Environs	2008

**Currently Under Review*

One of the challenges faced by the county is that these incorporated municipalities have complete authority within their own corporate limits. Although some municipalities have adopted their own master plans, most of these community plans were done jointly between the county and the corresponding municipality. This joint effort helps to develop understanding and agreement on land that is still within the county, but might be annexed into a municipality sometime in the future. In cases where the municipality has adopted its own comprehensive plan; the county plan only covers the area within the CPA that is outside the corporate limit. The joint plans cover the whole area within the CPA including the municipality. These community comprehensive plans, and the adopted land use and zoning that go along with them are one of the main tools which the County Commissioners use to guide growth to designated growth areas. Due to the fact that new schools often play a vital role in attracting new growth to an area, the Carroll County Master Plan states that “public educational facilities will be encouraged to be located within the Community Planning Areas, municipalities, and/or planned public water and sewer service areas to make them accessible to the populations they serve and to encourage the creation of mixed-use, pedestrian-oriented communities”.

In addition to the County Master Plan, the County also has an adopted Master Plan for Water and Sewerage that is updated every three years. That plan covers all public systems in the county as well as multi-use and private facilities. Existing and planned service areas for the public systems are identified in the plan as well as projected demand and capacities. Amendments to this plan are processed twice a year.

The provision of public (municipal or county) water and sewer service is offered primarily in designated growth areas. Public water and sewer systems are owned and operated by seven of the municipalities. The county owns and operates the sewer system in Hampstead, and the public water and sewer system in the Freedom area, including provision of these services to the Town of Sykesville. In the municipalities where these systems are owned and operated by the town, the municipalities control the extension of public water and sewer service to new development and annexed properties.

The chart on the following page identifies each public school and whether it is connected to a public water and sewer system.

Carroll County Public Schools
Public or Private Water and Sewer System Status
June 2008

School	Municipal/ County Water	Municipal/ County Sewer	Individual Water	Individual Sewer
Career & Technology Center	X	X		
Carroll Springs	X	X		
Carrolltowne Elementary	X	X		
Century High	X	X		
Charles Carroll Elementary			X	X
Cranberry Station Elementary	X	X		
Ebb Valley Elementary	X	X		
Eldersburg Elementary	X	X		
Elmer Wolfe Elementary	X	X		
Francis Scott Key High	X	X		
Freedom Elementary	X	X		
Friendship Valley Elementary	X	X		
Hampstead Elementary	X	X		
Liberty High	X	X		
Linton Springs Elementary	X	X		
Manchester Elementary	X	X		
Mechanicsville Elementary			X	X
Mt. Airy Elementary	X	X		
Mt. Airy Middle	X	X		
New Windsor Middle	X	X		
North Carroll High	X	X		
North Carroll Middle	X	X		
Northwest Middle	X	X		
Oklahoma Road Middle	X	X		
Parr's Ridge Elementary	X	X		
Piney Ridge Elementary	X	X		
Robert Moton Elementary	X	X		
Runnymede Elementary			X	X
Sandymount Elementary			X	X
Shiloh Middle	X	X		
South Carroll High **			X	X
Spring Garden Elementary	X	X		
Sykesville Middle	X	X		
Taneytown Elementary	X	X		
Westminster East Middle	X	X		
Westminster Elementary	X	X		
Westminster High	X	X		
Westminster West Middle	X	X		
William Winchester Elementary	X	X		
Winfield Elementary **			X	X
Winters Mill High	X	X		

Source: Carroll County Water & Sewer Master Plan, 2007

** These schools share a county-operated common community system

CONCURRENCY MANAGEMENT AND ADEQUATE PUBLIC FACILITIES

Although there has been some public concern over whether the community plans are truly guiding growth, the biggest concern has been the rate of growth. According to the Maryland Department of Planning, the 8,500 residents that Carroll County gained from 2001-2003 was the highest two-year total since 1969. As a result of this pace of development, and concerns over the ability to provide adequate infrastructure, the Carroll County Commissioners enacted a one-year residential building deferral from June 2003 to June 2004. This allowed the County time to revise their existing Concurrency Management and Adequate Public Facilities Ordinance in order to ensure the proper coordination with regard to growth and the provision of public facilities and services. In addition to the County revising its ordinances, many of the municipalities also either adopted new adequate public facilities ordinances, or revised their existing ones. These changes combined with a change the Maryland Department of Environment made to its groundwater allocation formula has caused a dramatic decline in the number of building permits issued in the last few years due to inadequate facilities. The number of Use and Occupancy permits issued has decreased from a high of 1,564 in 2002 to 877 in 2006, and 438 in 2007.

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 2009-2010 to 2018-2019 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 years:

Inadequate (120% and greater of Capacity)

Mount Airy Middle 2011-2014*

*The criteria used for Middle Schools is based on Local Capacity

Approaching Inadequate (110% to 119% of Capacity)

Freedom Elementary 2013-2014
Piney Ridge Elementary 2013-2014
William Winchester Elementary 2010-2014
Mount Airy Middle 2009-2010*
Sykesville Middle 2009-2010, & 2014
Liberty High 2009-2010

*The criteria used for Middle Schools is based on Local Capacity

The new school projects listed in the Facilities Needs Summary (see section 6) will provide relief for the current inadequate schools, and some of the approaching inadequate schools. Enrollments at the remaining schools that are identified as approaching inadequate will continue to be monitored to determine the need for relief facilities in the future.

CARROLL COUNTY PUBLIC SCHOOLS SCHOOL SITE INFORMATION

Property Name	Location	Acreage	School Attendance Areas	Property Owner	Comments
Black Farm (Ebb Valley subdivision)	Southeast of the intersection of Md. Rt. 30 and Lineboro Road	20	Manchester Elem. North Carroll Middle North Carroll High	Carroll County	Acquired October 5, 1989
Friendship Valley Middle	Northwest side of Gist Road adjacent to Friendship Valley Elementary		Friendship Valley Elem. Westminster High	Board of Education of Carroll County	Preliminary site planning complete; campus concept with Friendship Valley Elementary School
Mayeski Park	North side of Md. Rt. 26 adjacent to South Carroll High School	29.7	South Carroll High	Board of Education of Carroll County	Possible site for future south Carroll area middle school
Dulaney Property	North of Ronsdale Road and east of Klees Mill Road	80	Linton Springs Elementary Sykesville Middle Century High	Carroll County	Possible site for future south Carroll area middle school
Cape Horn Park	Northwest corner of intersection of Cape Horn Road and MD Route 30		Manchester Elementary North Carroll Middle North Carroll High	Carroll County	Site developed into a large regional recreational park. Opportunities as a school site limited.