



County of Monterey

Item No.1

Historic Resources Review Board

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PLN240141 - CARMEL VALLEY MANOR

Public hearing to consider a recommendation to the Monterey County Planning Commission for a Combined Development to allow alterations at the Carmel Valley Manor including the demolition of 2 duplex units, 5 single family dwellings and 7 visitor-guest units to be followed by the construction of 24 new independent-living duplex units and 8 visitor-guest units. Additional new construction would include a 12-bed assisted-living memory care facility and additions to the existing fitness center and “Meeting House.” The project also proposes the removal of 81 protected oak trees and development on slopes in excess of 25%.

Project Location: 8545 Carmel Valley Road, and 33, 27078, 27085, 27105, 27120 and 27125 Los Arboles Drive, Carmel (Assessor's Parcel Numbers, 169-061-012-000, 169-041-018-000, 169-041-025-000, 169-041-024-000, 169-041-023-000, 169-041-003-000, 169-041-019-000 and 169-061-018-000), Carmel Valley Master Plan.

RECOMMENDATION:

Staff recommends that the County of Monterey Historic Resources Review Board (HRRB) adopt a resolution recommending that the Planning Commission:

- 1) Adopt a Mitigated Negative Declaration pursuant to CEQA Guidelines section 15074;
- 2) Approve a Combined Development Permit consisting of:
 - a. Merger between seven legal lots of record: Parcel 1 (.39 acres), Parcel 2 (.64 acres), Parcel 3 (.27 acres), Parcel 4 (.39 acres), Parcel 5 (.38 acres), Parcel 6 (.54 acres) and Parcel 7 (22.15 acres), resulting in one parcel containing approximately 24.76 acres (Adjusted Parcel A)
 - b. Administrative Permit and Design Approval to allow demolition of 2 residential duplex units, 5 single family dwellings, 7 guest units, a wood shop and 3 carport structures, to be followed by the construction of 24 residential units, 8 guest units, a 12-bed memory care facility, additions to the existing fitness center and “Meeting House” and associated site improvements.
 - c. Use Permit to allow development on slopes in excess of 25%.
 - d. Use Permit to allow the removal of 81 protected oak trees; and,
- 3) Adopt a Mitigation Monitoring and Reporting Plan

DISCUSSION:

Overview:

Carmel Valley Manor is a full-service retirement community consisting of cohesively designed buildings arranged in a campus-like setting. Constructed in 1962-63, the Manor is located on the site of the former Noel Sullivan Estate (also known as “Hollow Hills Farm”). Mr. Sullivan was well-known as a patron of the arts, hosting a distinguished list of guests at the Estate including actors Charlie Chaplin and Douglas Fairbanks, actresses Joan Fontaine and Greer Garson, and musical artists Duke Ellington, Cole Porter and Yehudi Menuhin. Famous African American author Langston Hughes lived at the Estate for a year in the early 1930’s, where he penned his iconic short story collection “The Ways of White Folks.”

Noel Sullivan passed away in 1956 and the property was sold to Northern Congregational Retirement Homes, Inc. (AKA Carmel Valley Manor) and the establishing Use Permit for Carmel Valley Manor was approved by the Planning Commission on July 26, 1960. Original plans had called for the Sullivan Estate to be integrated into the design of the Carmel Valley Manor. However, a fire on New Years Day, 1962, destroyed most of the Estate structures including the 6-bedroom main house, the music room, and a cottage known as “Ennesfree” where Hughes had resided. A small chapel building (“Hollow Hills Chapel”) and an adobe groundskeeper’s cottage (now labeled “Bldg. 25”) survived the fire and have been retained.

Carmel Valley Manor opened on October 14, 1963, as a full-service retirement community, in essentially the same form as its current 26-acre setting. Additional construction in subsequent years has included the Hilcrest Center (assisted living building) in 1975, and additions to the “Main Pavilion” building including an expansive, gable-roofed dining room. Extensive (and meticulously cared-for) landscaping and gardens have been implemented in progressive stages, to include many varieties of trees, shrubs and ground cover, in an arboretum-style setting.

The 26-acre site is presently developed with 124 apartment units; 22 independent-living units distributed amongst duplex/triplex buildings, 6 single family dwellings (acquired neighboring properties), 7 visitor/guest units, a combined assisted-living/skilled nursing facility with 60 beds total, a meeting house/event room, and the aforementioned “Main Pavilion” with administrative offices, a dining room, and various “activity rooms.” Recreational amenities include a swimming pool, dog run, community garden and a putting green.

Carmel Valley Manor was designed by one of the leading Modernist architectural firms in the United States, Skidmore Owings & Merrill (SOM), which was founded in Chicago in 1936 by [Louis Skidmore](https://en.wikipedia.org/wiki/Louis_Skidmore) <https://en.wikipedia.org/wiki/Louis_Skidmore> and [Nathaniel Owings](https://en.wikipedia.org/wiki/Nathaniel_Owings) <https://en.wikipedia.org/wiki/Nathaniel_Owings>. The firm has designed three iconic “skyscrapers”; the Sears Tower in Chicago, One World Trade Center in New York City, and the Burj Khalifa in Dubai - currently the world’s tallest building at 2,722 feet. Some of their other noteworthy designs include the corporate headquarters building for the Walt Disney Company (Burbank, CA), Chicago-O’Hare International Airport, JTI Headquarters in Geneva, Switzerland, and the restoration/remodel of the Waldorf Astoria Hotel in New York City.

The residential units at Carmel Valley Manor are grouped in clusters, typically around a central courtyard. A network of concrete and brick paths connect the various community buildings, residential clusters, and courtyards. A unique feature of the design are the covered “pass-through” walkways of the residential buildings. Paired-shed roof massing is also a common theme to the

SOM-designed buildings on the campus. The most prominent building on the site, the “Meeting House,” features a square footprint and a four-sided pyramidal roof. The SOM-design approach is especially notable as being a departure from more typical designs for retirement centers. The design of the facility takes full advantage of the site by integrating a campus-like setting into the terrain of rolling-foothills. The majority of the original SOM-designed structures are centralized within an area referred to as the “Core Campus” of Carmel Valley Manor.

Some of the residential buildings have undergone minor alterations, although said alterations have been consistent for each building type and have not significantly diminished the character-defining features of the buildings or the character of the site as a whole. All buildings originally possessing wood shake roofs have seen them replaced with asphalt shingles.

The Applicant/Owner proposes the demolition of 5 independent-living single family dwellings that are not part of the original campus, 2 independent-living duplex units, 4 carport parking structures, a woodshop, and 7 visitor-guest units, none of which are SOM-designed structures. Proposed construction would include 24 independent-living duplex units and 8 new visitor-guest units. Additional new construction would include a 12-bed assisted-living memory care facility and additions to the existing fitness center and the distinctive pyramid-shaped “Meeting House.” The two proposed exterior changes to SOM-designed structures within the Core Campus include a new two-story fitness building south of the existing (previously modified) Fitness Center and a modest single-story addition to the rear (south) elevation the “Meeting House.”

A tour by the HRRB Site Review Subcommittee was facilitated by the applicant on June 27, 2025, at which time modifications were suggested by the HRRB. These modifications, which centered on the additions to the Fitness Center building and “Meeting House,” are illustrated on the attached plan set (**Exhibit H** - Plan Sheets AS-10DE, A-12D and A-12E). Most notably, the directly adjacent Fitness Center buildings have been modified to share the signature “paired-massing” and “matching roof-pitch” as found throughout the site (Sheet A-12D).

Reports:

Four separate reports pertaining to historic resources at Carmel Valley Manor have been drafted by PAST Consultants, LLC (Seth A. Bergstein). Reports #3 and #4 (below) are specific to this project application:

1. *Carmel Valley Manor: Architectural and Historic Preservation Design Guidelines* - September 6, 2013. (LIB250311 - PLN130588) **Exhibit D**
2. *Phase One Historic Assessment, Carmel Valley Manor* - May 19, 2013. (LIB130209) **Exhibit C**
3. *Historic Review of the proposed Master Plan Project* - June 3, 2024, August 7, 2023, and March 23, 2015. (LIB25009) **Exhibit E**
4. *Carmel Valley Manor Master Plan Phase Two Historic Assessment Report* - February 10, 2025. (LIB250311) **Exhibit D**

The 2013 “*Carmel Valley Manor: Architectural and Historic Preservation Design Guidelines*” (Item “1”, above) are not specific to this project but rather provide guidelines for future development.

As described on page 1 of the document:

The purpose of these Design Guidelines is to ensure that future work to the historic buildings are in keeping with the Standards (Secretary of the Interior's Standards for the Treatment of Historic Properties). An analysis of previous alterations to individual residential buildings reveals that previous alterations have predominantly met the Standards because the unique SOM design was recognized and prioritized when typical building alterations were made.

Another purpose of these Design Guidelines is to simplify the Phase Two permitting process when alteration to individual units is proposed in the future. Since the residential units are leased by retirement community tenants, individual units may be altered according to the new tenant's desires. These Design Guidelines will ensure that modifications to individual units continue to be performed consistently and respect the architectural design and historic materials of the Manor's individual buildings, as stipulated by the Standards.

The 3-part *Historic Review of the proposed Master Plan Project (Ex. E)* was prepared by Seth A. Bergstein (PAST Consultants LLC) to evaluate the historic significance of the structures and the site, and to gauge potential impacts which might result from the project. This assessment has been drafted in three phases (2015, 2023 and 2024) as the project has evolved. The findings of the report are summarized on pages 2-3 of the document, specifically:

- *Demolition within the Core Campus has been avoided by placing nearly all new buildings outside the core. With the exception of the addition to the Fitness Center, building alterations and new building additions have been kept outside the core.*
- *New housing northwest of the core will demolish the group of houses along Los Arboles Drive and replace them with new housing units. These buildings were reviewed by PAST in 2015 and none of them possess sufficient historic integrity.*
- *Removal of the Upper Visitor's Quarters near Los Arboles Drive and their replacement with New Independent Living Housing is appropriate, as it removes non-character defining buildings outside the Core Campus.*
- *The addition of a new Memory Care building adjacent to and southeast of the existing Hillcrest Assisted Living facility will remove one existing duplex. This proposed demolition does not impact the Core Campus. In addition, the design of this duplex is represented by similar duplex designs along the perimeter road and outside the core.*
- *The location of the proposed addition to the Meeting House is appropriate, as it places the addition on the south elevation, which is the least visible location; and preserves the open space and paths that link the Meeting House to the Core Campus.*
- *The removal of the existing Wood Shop and Lower Guest Cottage is appropriate, as these*

buildings are not character defining features of the site.

- *Based on our preliminary review of this Master Plan Packages One and Two, the additions and alterations to the historic Carmel Valley Manor are sensitive and will allow the property to maintain sufficient historic integrity and keep the subject property's local historic listing.*

The 2025 *Phase Two Historic Survey* (Ex. **D**) reiterates the project's compliance with the prior reports, and confirms that the form, materials and colors of the proposed new construction will be in keeping with the style and character of the historic buildings in the Core Campus. As noted in the *Phase Two Survey: The Secretary of the Interior's Standards for the Treatment of Historic Properties (Standards)* provides the framework for evaluating the impacts of additions and alterations to historic buildings. These ten *Standards*, and the project's compliance with them, are noted in the report as follows:

Standard 1. A property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces, and spatial relationships.

Compliance: The proposed alterations will allow the Carmel Valley Manor to continue its use as a residential 65+ care facility, while retaining the existing character-defining features of the Core Campus, in keeping with this *Standard*.

2. The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces, and spatial relationships that characterize a property will be avoided.

Compliance: The proposed site additions have been kept almost entirely outside of the Core Campus, which contains the most significant spatial relationships between the clusters of residential buildings, open space and the circulation networks that link the clusters. These aspects of the proposed Master Plan will satisfy this *Standard*.

3. Each property will be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken.

Compliance: The proposed new buildings and alterations to the Meeting House do not add conjectural features or elements from other historic properties that would confuse the remaining character-defining features of the subject property.

4. Changes to a property that have acquired historic significance in their own right will be retained and preserved.

Compliance: The proposed Master Plan does not include any changes to resources that may have acquired historic significance, in keeping with this *Standard*.

5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.

Compliance: The proposed Master Plan prioritizes the retention of the original SOM design

within the Core Campus, including retention of the building clusters set within a campus-like setting, the network of paths that connect the building clusters and the community buildings, and character defining features of the individual buildings, including the shed and forms with lush eaves, stucco wall cladding and metal fenestration. These character-defining features will be retained and rehabilitated, satisfying this *Standard*.

6. Deteriorated historic features will be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture, and, where possible, materials. Replacement of missing features will be substantiated by documentary and physical evidence.

Compliance: Individual buildings, their materials and features have been maintained carefully and continuously by Carmel Valley Manor staff, in keeping with this *Standard*.

7. Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.

Compliance: Chemical and physical treatments of the individual buildings have been undertaken using the gentlest means on an as needed basis by Carmel Valley Manor staff, in keeping with *Standard*.

8. Archeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.

Compliance: This *Standard* does not apply, as archaeological features are not identified at the site.

9. New additions, exterior alterations, or related new construction will not destroy historic materials, features, and spatial relationships that characterize the property. The new work shall be differentiated from the old and will be compatible with the historic materials, features, size, scale and proportion, and massing to protect the integrity of the property and its environment.

Compliance: Individual building removals and additions will be evaluated by location. (The report also notes that new structures will share the same roof-pitch general design characteristics of the SOM-designed structures but will also differentiate by their detailing and stucco finish.)

10. New additions and adjacent or related new construction will be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

Compliance: The proposed additions as designed by the Carmel Valley Master Plan could be removed in the future and the historic integrity of the site would still be maintained in support of this *Standard*, primarily because the most significant historic character defining features of the site are within the Core Campus.

The *Phase Two Historic Survey* concludes that the proposed Carmel Valley Manor's Master Plan additions and alterations to the historic Carmel Valley Manor conform to the *Secretary of the*

Interior's Standards for Rehabilitation. Therefore, the proposed project will not cause a significant impact to the environment, according to the California Environment Quality Act (14 CCR § 15126.4(b)(1)), allowing the buildings to maintain its historic integrity.

Additional Findings of Reports:

The Carmel Valley Manor does not qualify for “association with an event” according to the National Register (NR) Criterion A/CR Criterion 1 as no significant event occurred in connection with the facility. Similarly, the Manor does not qualify for association with a significant person (NR Criterion B/CR Criterion 2).

Carmel Valley Manor appears eligible for listing on the National and California Registers under National Register Criterion C (NR Criterion 1) because the complex embodies the distinctive characteristics of a type, period, or method of construction. The Manor represents a cohesive site in terms of its architectural design and relationship among buildings on the site and appears to be significant according to Monterey County Register (MC) “Criteria A” (*Monterey County Code 18.50.010 - Review Criteria*). The Modernist site is particularly representative of a distinct historical period, type, style, region or way of life (MC Criterion A1). The site is connected with someone renowned, Noel Sullivan (MC Criterion A3), although the primary resource from his occupancy, the Sullivan House, was destroyed by fire. The Core Campus represents the work of a master architect, Skidmore, Owings & Merrill, whose talent influenced a particular architectural style or way of life (MC Criterion A5).

The Manor appears to be significant according to Monterey County Register Criterion B3 as the architectural design and construction materials embody elements of outstanding attention to architectural design, detail, material and craftsmanship (MC Criterion B3).

The Manor appears to be significant according to Monterey County Register Criterion C, as the unique design of the Manor does materially benefit the historic character of the community (MC Criterion C1). The location and physical characteristics of the Manor do represent an established and familiar visual feature of the community, area, or county (MC Criterion C2).

To allow alterations to a designated resource a finding must be made that the proposed work is found to be consistent with the purposes of MCC Chapter 18.25 (*Preservation of Historic Resources*) and will neither adversely affect the significant architectural features of the designated resource nor adversely affect the character of historical, architectural, or aesthetic interest or value of the designated resource and its site (MCC section 18.25.170.D.1).

CEQA

Pursuant to Public Resources Code Section 21083 and California Environmental Quality Act (CEQA) Guidelines Sections 15063(a) and 15063(b)(2), Monterey County, as Lead Agency, have undertaken review to determine if the project may have a significant effect on the environment. A draft initial study and mitigated negative declaration (IS/MND) was prepared for this project (**Exhibit H**).

The draft IS/MND was circulated for public review from DATE to DATE.

The draft IS/MND identified “less than significant impacts” to Cultural Resources. Although no mitigation is required to reduce impacts to a less-than-significant level, the following measure is recommended as a best practice to ensure preservation of the property’s development record:

Mitigation Measure CR-1 (Documentation of Non-Contributing Structures)

Prior to demolition of non-contributing buildings, the project proponent shall prepare representative photographic documentation and descriptive records of the affected structures and site context in accordance with Historic American Buildings Survey (HABS) standards, as appropriate. Documentation shall be archived within the Carmel Valley Manor facility records and submitted to the Monterey County Housing and Community Development Department and the Monterey County Historical Society for reference.

Implementation of this measure would not constitute required mitigation under CEQA, as the project impacts are considered less-than-significant.

CEQA Guidelines section 15074(a) requires that advisory bodies consider the prepared environmental document when making a recommendation to the decision-making body, which in this case is the Planning Commission. Staff recommends the HRRB consider the prepared Draft IS/MND, find the analysis adequate to address potential impacts on historic resources, and recommend approval of the project as proposed.

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Reviewed and approved by: Fionna Jensen, Principal Planner - (831) 796-6407

The following attachments are on file with Housing and Community Development:

Exhibit A - Draft Resolution

Exhibit B - Project Plans

Exhibit C -Phase I Historic Assessment (May 19, 2013)

Exhibit D - Phase II Historic Assessment w/ Architectural and Historic Preservation Design Guidelines (February 10, 2025 [Assessment] and September 2013 [Design Guidelines])

Exhibit E -Historic Review of the proposed Master Plan project (June 3, 2024 / August 7, 2023 / March 23, 2015)

Exhibit F - Applicant-submitted project overview (May 16, 2024)

Exhibit G - Carmel Valley LUAC meeting minutes (July 21, 2025)

Exhibit H - Draft Initial Study/Mitigated Negative Declaration

cc: Joel Panzer (Agent); Jay Zimmer (Applicant); Ashley Chung (Project Coordinator), Seth Bergstein (Historical Consultant); Project File PLN240141