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Holiday Guidelines

Summary: Holidays are leisure experiences that provide a break away from the usual home surroundings and day to day routines. They provide opportunities for community participation and social inclusion enhancing a person's self esteem, independence, health and wellbeing.

The Holiday Guidelines provide guidance to support workers on how to support people with disability and where required their families/guardians to plan safe and enjoyable holidays as part of a healthy and balanced lifestyle.





Holiday Guidelines

Document name	Holiday Guidelines
Policy	Lifestyle Planning Policy
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Policy manual	Lifestyle Policy and Practice Manual
Approved by	Deputy Chief Executive, ADHC
Summary	<p>Holidays are leisure experiences that provide a break away from the usual home surroundings and day to day routines. They provide opportunities for community participation and social inclusion enhancing a person's self esteem, independence, health and wellbeing.</p> <p>The Holiday Guidelines provide guidance to support workers on how to support people with disability and where required their families/guardians to plan safe and enjoyable holidays as part of a healthy and balanced lifestyle.</p>
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Version control

The first and final version of a document is version 1.0.

The subsequent final version of the first revision of a document becomes version 1.1.

Each subsequent revision of the final document increases by 0.1, for example version 1.2, version 1.3 etc.

Revision history

Version	Amendment date	Amendment notes
V1.0	March 2013	Replaces Holiday and Overnight Stay Policy and Procedures, 2001
V1.1	December 2013	Amended to reflect: <ul style="list-style-type: none">• Position changes following formation of Districts• Delegation changes in FACS Delegations Guidelines, August 2013• Revised references to risk identification and mitigation, and consent in the Holiday Planner

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1 Guidelines

1.1 Introduction

Leisure and recreational activities are essential to lifelong development and promote a healthy and balanced lifestyle.

Holidays are leisure experiences that provide a break away from the usual home surroundings and day to day routines. They provide opportunities for community participation and social inclusion enhancing a person's self esteem, independence, health and wellbeing.

Consistent with the UN Convention on the Rights of People with Disabilities, people with disability have the same right, as others in the community, to pursue self determined holidays, recreation and leisure activities as part of their Lifestyle Plans. On that basis, holidays no longer require approval by ADHC management.

1.2 Purpose

The purpose of the Holiday Guidelines (the Guidelines) is to guide support workers on how to support people with disability, and where required, their families/guardians, to plan and have safe and enjoyable holidays as part of a healthy and balanced lifestyle.

The implementation of the Guidelines is mandatory in ADHC operated accommodation support services.

1.3 Scope

For the purposes of these Guidelines:

- A **holiday** is defined as any overnight stay away from their regular residence for recreational purposes, including a single night away. A person may choose to stay overnight with family or friends, or travel to local, interstate or overseas destinations. The frequency and type of holidays will depend on personal choice, affordability, individual needs and required support.
- **An outing** is defined as a leisure break which does not involve a person having an overnight stay away from their residence. As such, the requirements of these Guidelines **do not apply** to these activities.

While the requirements of these Guidelines do not apply to outings, support workers are reminded that outings are essential to an inclusive community life and people must be supported to participate in a range of community based social and recreational activities. The types of outings people go on usually represent the things that are IMPORTANT TO them in their lifestyle. Preferences for outings should be explored as part of the information gathering phase during Lifestyle Planning. Outings and regular recreational activities should become part of a person's ongoing lifestyle and incorporated into regular household routines.

- **Temporary relocations.** These Guidelines do not apply to individuals who are temporarily relocated while repairs and maintenance are being carried out on the group home e.g. painting, carpeting.

1.4 Good practice requirements

When supporting individuals to plan and make decisions about holidays, disability support workers must follow good practice requirements:

1.4.1 Healthy and fulfilling lifestyles

Individuals will be supported to maintain and enhance a healthy and fulfilling lifestyle by including holiday opportunities in the leisure and recreational experiences within their **Lifestyle Plan**.

Expanding personal leisure interests and experiences promotes feelings of pleasure, fulfilment, creativity, affiliation, happiness, spontaneity, imagination and other feelings commonly associated with lifelong development and personal wellbeing.

1.4.2 Social inclusion and participation in the community

Holidays should provide meaningful opportunities to be involved in community life; to promote and build personal support and social networks with people of a similar age and/or who share common interests; and contribute to a person's **sense of belonging and being valued**.

A community is not just about the geographic area where a person lives. A community can be a community of interest, a community of friends or even attending events e.g. the Elvis Festival in Parkes or the Country Music Festival in Tamworth.

1.4.3 Learning and skills development

Planning and participating in holidays should provide opportunities to engage in **personal choice making** behaviour and to develop life skills and independence. This includes choosing and self-initiating holidays and holiday activities, using and enjoying home and community based leisure and recreational activities, alone and in a group, and interacting with others in a social setting.

1.4.4 Age and life stage appropriate

Individuals will be provided with information and support to help them to choose holidays that are **appropriate to their age and life stage** and are compatible with activities undertaken by others in the community of a similar life stage and/or who share common interests.

The same principles of active ageing that are promoted in the general community will be reflected and used for supporting people in accommodation support services to plan and arrange holidays.

1.4.5 Cultural and linguistic diversity

Cultural concepts of leisure will be **respected and supported** in the context of each person's background. Cultural practices will be supported in planning and arranging holidays including dietary habits, language, religion, spirituality, social and gender roles and decision making.

1.4.6 Accountability, transparency and confidentiality

Support workers will act in the best interests of the person, maximise the person's involvement in decisions and maintain the **highest standards of integrity, probity and accountability and ethical behaviour** when planning and arranging holidays.

1.5 Planning and arranging holidays

1.5.1 Lifestyle Planning

Support workers are responsible for supporting people with disability to plan and make decisions about holidays as part of **Lifestyle Planning** activities, together with the support of the person's family/guardian/formal financial manager, and other significant people involved in the person's life.

The frequency and type of holidays will depend on personal choice, affordability, individual needs and required support. Choosing the most appropriate option/s requires balancing a range of issues including:

- Holiday options - these can include a new holiday destination, visiting and staying with family or going away on a regular social or sporting activity.
- Holiday costs and budgets.
- Health and safety risks and related management plans.
- Requirements for personal support and assistance.
- Holiday providers, either a generic agency/holiday company or a specialised disability holiday provider.

1.5.2 Unplanned holiday opportunities

Consistent with the principle of developing healthy and fulfilling lifestyles support workers should encourage and support individuals to take advantage of unplanned holiday opportunities that might arise throughout the year and were either unforeseen or unavailable at the time the Lifestyle Plan was being developed.

1.5.3 Supported holidays

All support and assistance that is required by the individual during the holiday must be provided by family/friends or an experienced holiday service provider.

Staff assisted holidays must only be considered if all other holiday options such as support from family or friends or holiday service providers have been exhausted and the person cannot be supported in any other way. See Section 1.12 Exceptional circumstances for more information.

1.5.4 Holiday service providers

These are agencies that are specifically equipped to provide holiday services in the community, independent of departmental involvement. They can be mainstream or specialist providers and include private travel agencies, government tourist associations and holiday services for people with disabilities.

- Obtaining quotes and selecting holiday service providers

When sourcing appropriate holiday service providers it is important that at least two quotes are sought from holiday providers. Obtaining a quote ensures that:

- There is transparency in procurement of services - one holiday provider is not gaining an unfair financial advantage;
- People have greater choice; and
- There is value for money through a competitive process.

When selecting a holiday service provider support workers should look for and/or specifically request evidence that the provider has experience in supporting people with disability including qualifications and experience of staff who will be accompanying the person.

It is advisable to request the holiday service provider's contract/policies as part of the selection process to ensure that the terms and conditions protect the rights, health and safety, of the individual. For example:

- Medical or other emergencies which may occur during the holiday – e.g. their contingency plans for ensuring individuals are able to travel home ahead of schedule if for example, they become ill or distressed while on holidays
- Any additional costs which may apply in certain circumstances.

1.6 Holiday planning tools

The Guidelines provide two holiday planning tools for support workers to use when supporting people to plan and arrange holidays:

1. **Checklist for Visits with Family/Friends** – for recreational overnight stays with family or friends.
2. **My Holiday Planner** – for all other holiday destinations.

These tools are presented in a self contained format so that all information about the holiday including attachments, consents, financial approvals and ADHC endorsement are contained within **one document**.

They have been designed to encourage support workers to take a person centred approach and have a conversation with the person they are supporting to plan the holiday. Some Boardmaker images have also been included. If preferred, the Boardmaker images can be removed or replaced with communication styles that reflect the person's communication style.

Depending on the nature of the holiday, support workers will be required to complete and submit **only one of these tools** together with any attached management plans as required by the person.

Support workers are not required to submit any other submissions or briefing notes with the exception of staff assisted overseas holidays. These types of holidays will require a Ministerial submission in addition to the completed Holiday Planner in line with **FACS Delegations Guidelines (August 2013)**. Ministerial approval is required for overseas staff travel. Further information about staff assisted holidays is provided in **Section 1.12.1** of these Guidelines.

1.6.1 Checklist for Visits with Family/Friends (Checklist)

The Checklist applies to holidays that are recreational overnight stays with family/friends for example one weekend a month or to attend family events for example parents' birthdays, Christmas celebrations or attending a family wedding.

Support workers are required to complete the Checklist prior to the visit to ensure that all relevant medication, health and safety risks and support arrangements are up to date and that:

- Family/friends have been provided with information about the person's usual medication, health and safety supports and routines.
- Family/friends have been advised of any new or changed needs or health and safety issues.
- The person's absence and expected return date and time have been documented.
- Emergency contact details are exchanged and recorded.

If there are any costs associated with the visit these must be discussed to ensure that the person has sufficient funds and is happy to make the contribution. If the family does not directly manage the person's finances then depending on the amount requested a **'Request to Incur Expenses'** form may need to be completed and approved. Approval may also be required from a Financial Manager if the person is under formal financial management. See **Section 1.7 Table 1 Financial Delegations** below for details.

Support workers must ensure that any requests to incur expenses are submitted and approved in a timely manner to avoid any delays on the time to be spent together. This is particularly important for date sensitive planned family events for example; a family wedding or christening.

Once arrangements have been completed the Team Leader is required to sign the Checklist to acknowledge that all necessary checks and arrangements have

occurred and that all support workers are aware that the person will be away. A copy of the Checklist may be provided to the family/friend if required or requested.

Many individuals participate in regular overnight visits to family that have been established over a long period of time. It is good practice to use the Checklist as a guide to ensure that person's needs and support arrangements have not changed. If there are no changes it can be documented as "no change in arrangements from the previous visit" and endorsed as required below by the relevant ADHC managers.

The Team Leader then forwards the Checklist to the Coordinator, Accommodation and Respite who is responsible for acknowledging the Checklist and notifying all levels of management within their district of the person's absence from their residence.

The Checklist is returned to the Team Leader to be filed in the Lifestyle Support Section of the person's Green Active file.

1.6.2 My Holiday Planner

My Holiday Planner (Holiday Planner) applies to all other holiday destinations and contains six sections:

- Section A: My holiday details and itinerary
- Section B: About me and my support arrangements
- Section C: My holiday budget
- Section D: My emergency contacts
- Section E: Consent and endorsement
- Section F: Request for ADHC staff assisted holiday

Support workers must complete **Sections A through to E** for individuals who are planning and arranging all other types of holidays other than a recreational overnight stay with family/friends.

Section F is completed in addition to Sections A to E ONLY if an ADHC staff assisted holiday is being recommended. Please see **Section 1.12 Exceptional Circumstances** for more information.

The Holiday Planner has been designed to be self explanatory. Each section directs support workers on what information is required and what supporting documentation is to be attached.

Support workers must ensure that the Holiday Planner is completed accurately and all consents, endorsements and financial approvals are obtained and correctly documented in the relevant parts of the Planner.

The completed Holiday Planner together with all supporting attachments is then submitted through line management to the relevant delegated officer for endorsement. See **Section 1.9 Endorsements** for the correct delegations.

Endorsement of the Holiday Planner is not an 'approval' by ADHC. It is an acknowledgement by the delegated officer that the planning and organisation of the holiday has been transparent and that the person's best interests have been addressed to ensure a safe and enjoyable holiday.

Following endorsement of the Holiday Planner, support workers must proceed to finalise arrangements for the agreed holiday. These arrangements will differ depending on whether the person is being assisted by family, using a holiday provider or arranging some or all of the holiday independently.

A copy of the endorsed Holiday Planner must be provided to the:

- Person
- Family/guardian/person responsible
- Holiday provider if applicable as well as any other people who are providing direct support on the holiday
- Appointed financial manager if the person is under formal financial management
- Coordinator, Accommodation and Respite who is responsible for ensuring that all levels of district management are aware of the person's absence from their residence.

Once all the holiday arrangements have been completed a copy of the endorsed **Holiday Planner** must also be filed in the Lifestyle Support Section of the person's Green Active file.

1.7 Budgeting for holidays

The person going on the holiday is responsible for all costs associated with the planned holiday. Support workers must ensure that the person, their family/guardian and formal financial manager (if applicable) review the personal budget to ensure sufficient funds are available for the holiday.

The cost of the holiday and related activities must be discussed and agreed to during the review of the personal budget at the Lifestyle Planning meeting. The holiday budget must be itemised as part of the holiday planning and arrangement process.

Once the budget is agreed a **Request to Incur Expenses** form must be completed and attached to the Holiday Planner along with a copy of the individual's personal annual budget. Approval must be obtained for expenses **prior to** making any bookings or financial commitments as per the financial delegations in Table 1 below:

Table 1 Financial delegations

Financial expenditure level	Delegated Line Manager
Up to \$250	Team Leader approval is required
\$251 up to \$500	Coordinator A&R approval is required
\$501 up to \$1,000	Manager A&R approval is required
Over \$1,001	Director, Disability & Home Care approval is required

NOTE: Support workers in Large Residential Centres and Specialist Supported Living services are required to follow the financial delegations that apply to their business stream.

If support workers have concerns that decisions about holiday expenditure are not being made in the person's best interests they should seek advice from their line manager. The line manager must attempt to resolve the issue at the unit level in the first instance. If the issue cannot be resolved the line manager must refer the matter to their next line manager for further advice and action.

1.8 Consents and approvals

Consistent with the UN Convention on the Rights of People with Disabilities holidays are no longer required to be approved by ADHC management. Decisions about lifestyle choices including holidays are made independently by the person or they are assisted by family or other key people in the person's life. The role of support workers is to support the person to make informed decisions and choices.

Consent is required from the person or their family/guardian/person responsible to:

- Indicate their agreement to the holiday arrangements as detailed in the Holiday Planner
- Indicate their understanding and awareness that the holiday involves some risk
- Allow support workers to provide personal information to holiday providers and others involved in arranging the holiday.

Consent must be obtained and documented as shown in **Section E of the Holiday Planner**.

ADHC approval is required for:

- Financial expenditure as per the Financial delegations in the **Table 1, Section 1.7**.
- Staff to travel on staff assisted holidays as per the Approval for Staff Travel Delegations in **Table 3, Section 1.12.2**.

1.9 Endorsements

While 'approval' for holidays is not required, Managers must endorse that appropriate duty of care has been applied in supporting the person to plan and arrange a safe and enjoyable holiday and all necessary processes have been completed as required in the Holiday Planner.

Once the Holiday Planner is completed, the Team Leader must submit the Holiday Planner through their Coordinator for endorsement (endorsement block located in Section F of the Holiday Planner) and further management endorsement depending on the holiday destination as per the Endorsement delegations in Table 2 below.

The delegated manager is also responsible for ensuring that all levels of district management are aware of the person's absence from their residence.

Table 2 Endorsement delegations

Destination	Group Homes	Specialist Supported Living (SSL)	Large Residential Centres (LRC)
Endorses Holiday Planner for holidays within NSW	Coordinator, Accommodation and Respite	Nurse manager Accommodation & Nursing Services	Nurse Manager, A&NS (NMANS)
Endorses Holiday Planner for interstate holidays	Manager, Accommodation and Respite	Manager, SSL	Principal Nurse Manager, Accommodation & Nursing Services
Endorses Holiday Planner for overseas holidays	District Director	Director, SSL	Chief Executive Officer, LRC

1.10 Managing concerns or disagreements

Ensuring that the person's best interests are met is particularly relevant when there are significant health, safety or behavioural issues to be considered and there is disagreement about appropriate holiday options or support. Support workers should make every effort in the first instance to resolve concerns/issues at the Unit level during the holiday planning stage.

If the person and/or their family and significant others remain decided to go ahead with the proposed holiday, support workers must ensure that:

- All risks and relevant support plans are fully documented in the Holiday Planner

- The person, their family and any other significant others are fully informed and aware of all these issues when giving their consent to the holiday as required in **Section E of the Holiday Planner**
- A copy of the signed Holiday Planner is provided to the person, family and any significant others involved in organising the holiday.

If support workers remain seriously concerned that decisions about the holiday are not being made in the person's best interests they must escalate the matter to the **District Director** for further advice and action.

1.11 Providing information to others

Copies of the Checklist or Holiday Planner must be provided to holiday providers and any other people with responsibility for arranging and/or supporting the person during the holiday. Consent from the individual or their family / guardian must be obtained from the person their family or guardian before this information can be released.

1.12 Exceptional circumstances

1.12.1 ADHC staff assisted holidays

Staff assisted holidays must only be considered if all other holiday options such as support from family or friends or specialist holiday providers have been exhausted and the person cannot be supported in any other way.

If a staff assisted holiday is being recommended as the only solution then **Section F of the Holiday Planner – Request for ADHC staff assisted holiday** – must be completed in addition to Sections A to E.

Section F requires staff to provide reasons and supporting evidence for why assistance by support workers is required for the holiday as well as details of staffing and support arrangements and costs.

Staff support costs are considered holiday expenses and are therefore the responsibility of the person taking the holiday. Actual costs for the staff member/s as appropriate including; salary, any award related allowances, backfill costs, holiday travel costs, holiday accommodation costs, holiday entry or venue costs where direct assistance is provided; **must be itemised and clearly stated in Section B (My holiday budget)** as well as shown as a total staff support cost in **Section F** of the Holiday Planner.

Funds for these costs **must be available in the person's budget and agreed to** by the person taking the holiday and their family/guardian or formal financial manager.

Personal spending money and any extra costs that are not part of the agreed support arrangements are the responsibility of the staff member. Any costs incurred during the holiday that are in excess of the agreed budget and that staff consider to be additional support costs must be documented and accompanied by a receipt or evidence before any reimbursement action is to be considered.

The Team Leader is responsible for completing **Section F** and submitting the completed Holiday Planner including all supporting documentation to the Coordinator Accommodation and Respite. The Coordinator checks the Holiday Planner for accuracy and completeness and endorses this by signing the signature block as indicated in Section F and forwards the Holiday Planner and all supporting documentation through line management to the relevant delegated manager for approval.

1.12.2 Approvals for staff to travel on assisted holidays

All requests for staff to travel on assisted holidays must be approved by management in accordance with Schedule I of the FACS Delegations Guidelines (August 2013). A summary of these delegations are provided below in **Table 3 – Delegations to approve staff travel**.

- For interstate holidays and those within NSW:

The delegated manager indicates their approval by signing directly in the signature block provided in Section F of the Holiday Planner. In these instances the Holiday Planner should be all that is required to be submitted. A covering briefing note may be requested. The briefing note should be succinct and should not duplicate the information in the Holiday Planner.

- For overseas holidays:

Only the Minister has the delegation to approve staff to travel overseas. Therefore a Ministerial submission is required to accompany the Holiday Planner. The submission must be prepared in accordance with Ministerial Executive Services (MES) requirements and attached to the Holiday Planner. Both will need to be forwarded in the usual way through line management to the Chief Executive.

The submission should be brief and not duplicate the information contained in the Holiday Planner as it contains all the documentation, evidence and management endorsements that will be required for the Chief Executive and the Minister to make their decision. A Ministerial submission template and a sample submission are provided in the Holiday Tools and Templates.

Table 3 Delegations to approve staff travel

Destination	Group Homes	Specialist Supported Living (SSL)	Large Residential Centres(LRC)
Staff travel for holidays within NSW by air or other means	District Director	Director, SSL	Chief Executive Officer, LRC
Staff travel for interstate holidays by air or other means	District Director	Executive Director, LRCSSL	Executive Director, LRCSSL
Staff travel for overseas holidays	Minister	Minister	Minister

No bookings or other related planning should occur until approval is given by the relevant delegated manager or the Minister in the case of overseas holidays.

If approved, staff accompanying a person on holiday must ensure they have a current passport and all required health checks and vaccinations.

Any other requests for holiday assistance that fall outside these Holiday Guidelines must be submitted through line management to the **District Director** for consideration and any further action.