

CHECKLIST

Retreat Self-Assessment

Fourteen questions to ask yourself before taking retreat bookings.

YOGAPROS

Last updated – September 2026

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Compliance & Safety



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◆ INTRODUCTION

This template provides a practical starting point for planning, recording, and reviewing your professional practice. Adapt it to suit your role, teaching environment, students, and any relevant legal, safeguarding, or insurance requirements.

◆ RUNNING A RETREAT

Before taking retreat bookings, ask *yourself*:

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- ☐ Have I named the person responsible for safety?
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 - ☐ Have I assessed the venue and every planned activity?
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 - ☐ Have I checked whether package travel rules may apply?
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 - ☐ Have I confirmed the correct insurance and policy conditions?
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 - ☐ Have I checked the qualifications and insurance of other teachers and suppliers?
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 - ☐ Have I explained the retreat accurately before students book?
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 - ☐ Have I created a focused process for health and accessibility information?
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 - ☐ Do I know how this information will be stored, shared and deleted?
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 - ☐ Can students opt out of activities without pressure?
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CHECKLIST

- ☐ Have I planned for emergencies, evacuation and first aid?
- ☐ Can I provide accurate food and allergen information?
- ☐ Does the team know who is responsible for what if something goes wrong?
- ☐ Do I have a process for safeguarding concerns and complaints?
- ☐ Will I review the retreat and update my systems afterwards?

If the answer to any of these is no, now is the time to make a change.

IMPORTANT

This checklist is provided for general awareness, professional orientation, and reference only. It is an example of points you may wish to consider and is not exhaustive, nor is it a substitute for professional legal, tax, insurance, safeguarding, or other advice specific to your individual circumstances.

YOGA PROS

*A Learning Hub resource from the Compliance
& Safety team — helping members teach with
confidence.*

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