

Yoga Retreat Safety & Planning Checklists

Good preparation, clear responsibilities and practical safety checks — work through your retreat before, during and after the event.

YOGAPROS

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Written by Claire Campbell

Compliance & Safety

A decorative graphic in the bottom right corner of the page. It features a large, solid purple circle representing a head, and a stylized, angular purple shape below it representing a body in a yoga pose, possibly a Warrior II or a similar standing pose. The shape is composed of several straight lines meeting at sharp angles, creating a modern, geometric look.

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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

More than a great *itinerary*.

Running a successful retreat involves more than creating a great itinerary. Good preparation, clear responsibilities and practical safety checks can help protect you, your team and your students.

Use these checklists to work through your retreat before, during and after the event.

◆ BEFORE THE RETREAT

1. Before you take *bookings*.

Define responsibilities

☐ Have I decided who is responsible for organising the retreat?

☐ Have I identified a person responsible for health and safety?

☐ Is there an emergency lead?

☐ Is there a first-aid lead?

-
- ☐ Is there a safeguarding lead, where relevant?
 - ☐ Is someone responsible for student information?
 - ☐ Is someone responsible for food and allergen information?
 - ☐ Is responsibility for each activity clearly assigned?
 - ☐ Have I shared responsibilities and contact details with everyone involved?
-

Check whether package travel rules apply

If you are combining accommodation with transport, excursions or other significant travel services:

-
- ☐ Am I selling two or more travel services for the same trip?
 - ☐ Are they advertised or sold together?
 - ☐ Am I arranging transport, accommodation or excursions?
 - ☐ Am I passing booking or payment details to another travel provider?
 - ☐ Have I clearly explained what is and isn't included?
 - ☐ Have I checked whether the Package Travel and Linked Travel Arrangements Regulations apply?
 - ☐ Have I obtained appropriate advice if I'm unsure?
-

◆ BEFORE THE RETREAT

2. Check your *insurance*.

Do this **before advertising the retreat or accepting bookings**.

-
- ☐ Have I spoken directly to my insurer about the retreat?
 - ☐ Does my policy cover the way I am organising the retreat?
-

-
- ☐ Do I need Tour Operator Insurance or additional business insurance?
 -
 - ☐ Is accommodation covered?
 -
 - ☐ Is travel or transport covered?
 -
 - ☐ Is every activity covered?
 -
 - ☐ Are there exclusions for activities such as hiking, swimming, water sports or adventure activities?
 -
 - ☐ Are any specialist techniques covered?
 -
 - ☐ Does the territorial limit cover the retreat location?
 -
 - ☐ Are there conditions relating to qualifications, supervision, record keeping or risk assessments?
 -
 - ☐ Does every teacher have appropriate professional and public liability cover?
 -
 - ☐ Are assistants, volunteers or additional teachers covered?
 -
 - ☐ Do subcontractors need their own insurance?
 -
 - ☐ Do I know what to do if an incident or potential claim occurs?
 -
 - ☐ Have I stored my insurance certificates, policy schedules and relevant correspondence securely?

Don't assume that standard yoga teacher insurance automatically covers the wider activities involved in organising a retreat.

◆ BEFORE THE RETREAT

3. Check the *venue*.

Where possible, visit the venue before committing to the retreat.

-
- ☐ Are entrances, teaching spaces, bedrooms, bathrooms and dining areas accessible and safe?
 -
 - ☐ Have I checked flooring, stairs and uneven surfaces?
 -
 - ☐ Is lighting adequate?
-

-
- ☐ Are heating and ventilation suitable?
 - ☐ Are fire exits and evacuation routes clearly identified?
 - ☐ Is first-aid provision available?
 - ☐ Can emergency services access the venue easily?
 - ☐ Is mobile phone reception available?
 - ☐ Have I considered outdoor areas, water, balconies and other environmental risks?
 - ☐ Is there a private space where students can rest or speak to a team member?
 - ☐ Can the venue accommodate the intended group size safely?
 - ☐ Have I considered accessibility requirements?
 - ☐ Have I obtained the venue's emergency procedures?
 - ☐ Have I clarified which safety responsibilities remain with me?
-

◆ BEFORE THE RETREAT

4. Check your suppliers & *contractors*.

For teachers, caterers, drivers, guides and activity providers:

-
- ☐ Have I checked their qualifications and relevant training?
 - ☐ Have I checked references or previous experience where appropriate?
 - ☐ Have I seen their insurance certificates?
 - ☐ Have I checked first-aid or safeguarding training where relevant?
 - ☐ Do I have their emergency contact details?
-

-
- ☐ Are payment terms clear?
 - ☐ Are cancellation and substitution arrangements clear?
 - ☐ Is there a process for reporting incidents or changes?
-

◆ BEFORE THE RETREAT

5. Complete your retreat risk *assessment*.

Your risk assessment should cover the **whole retreat**, not just the yoga classes.

For each risk, ask

-
- ☐ What could cause harm?
 - ☐ Who could be affected?
 - ☐ What controls are already in place?
 - ☐ What further action is needed?
 - ☐ Who is responsible for that action?
 - ☐ When will the risk assessment be reviewed?
-

Consider

-
- ☐ Arrival and departure
 - ☐ Teaching spaces
 - ☐ Yoga practices
 - ☐ Hands-on adjustments
 - ☐ Sound, scent and essential oils
-

- ☐ Breathwork
- ☐ Outdoor activities
- ☐ Food and allergens
- ☐ Fire and evacuation
- ☐ Medical emergencies
- ☐ Accessibility
- ☐ Staffing and cover arrangements
- ☐ Transport
- ☐ Weather conditions
- ☐ Equipment

Review your risk assessment if the venue, timetable, group size, staff or activities change.

◆ BEFORE THE RETREAT

6. Create an emergency *plan*.

Make sure your emergency plan includes:

- ☐ Full venue address and access instructions
- ☐ Emergency services contact details
- ☐ Nearest hospital or medical centre
- ☐ Nearest pharmacy where relevant
- ☐ First-aid arrangements
- ☐ Secure emergency contact information for students

-
- ☐ Fire exits and assembly points
 - ☐ Accessible evacuation arrangements
 - ☐ Named emergency roles
 - ☐ How the team will communicate with students
 - ☐ What happens if a teacher or supplier becomes unavailable
 - ☐ What happens if an activity or venue becomes unavailable
 - ☐ How incidents will be recorded
 - ☐ How incidents will be reported
 - ☐ When the insurer should be contacted
-

Before the retreat

-
- ☐ Has the whole team been briefed?
 - ☐ Does everyone know who takes charge during an emergency?
 - ☐ Does everyone know how to raise the alarm?
 - ☐ Does everyone know where emergency information is kept?
-

◆ BEFORE THE RETREAT

7. Protect student *information*.

Only collect information that you genuinely need.

-
- ☐ Do I know why I am collecting each piece of information?
 - ☐ Am I only collecting information that is necessary?
-

-
- ☐ Do I know who needs access to it?
 -
 - ☐ Is it stored securely?
 -
 - ☐ Have I told students how their information will be used?
 -
 - ☐ Have I decided how long it needs to be retained?
 -
 - ☐ Do I have a process for securely deleting information when it is no longer needed?
 -
 - ☐ Can students update their information if their circumstances change?
 -
 - ☐ Am I avoiding unnecessary detailed medical histories?
 -
 - ☐ Am I keeping health information out of general group chats?
 -
 - ☐ Am I only sharing health information with people who genuinely need it?
 -

Keep consent separate

-
- ☐ Do I have a lawful reason for collecting and using personal information?
 -
 - ☐ Have I explained privacy clearly to students?
 -
 - ☐ Is participation in an activity a separate choice?
 -
 - ☐ Can students change their mind?
 -
 - ☐ Is photography/marketing consent recorded separately?
 -

◆ BEFORE THE RETREAT

8. Give students clear information before *booking*.

Your retreat information should clearly explain:

CHECKLISTS

- ☐ Yoga styles
- ☐ Intensity and experience level
- ☐ Optional and compulsory activities
- ☐ Use of touch
- ☐ Sound, scent and essential oils
- ☐ Breathwork
- ☐ Accommodation
- ☐ Room-sharing arrangements
- ☐ Meals and refreshments
- ☐ Travel and transfers
- ☐ Accessibility
- ☐ Price and payment schedule
- ☐ Cancellation terms
- ☐ Minimum group size, if applicable
- ☐ What happens if the retreat or an activity changes
- ☐ How students can contact you
- ☐ How health and emergency information will be handled

Avoid vague claims such as “**suitable for everyone**” unless you can clearly explain what that means.

◆ BEFORE THE RETREAT

9. Collect essential student *information*.

CHECKLISTS

Before arrival, consider whether you have the information you need to support each student safely.

- ☐ Emergency contact
- ☐ Relevant health information
- ☐ Accessibility requirements
- ☐ Dietary requirements
- ☐ Allergies
- ☐ Relevant restrictions or adjustments
- ☐ Information needed for specific activities
- ☐ Have students been given a way to update their information before arrival?
- ☐ Is the information stored securely?
- ☐ Is access restricted to those who need it?

◆ BEFORE THE RETREAT

10. Prepare a student *briefing*.

Before the retreat, provide practical information covering:

- ☐ What students need to bring
- ☐ How to contact the retreat team
- ☐ What to do in an emergency
- ☐ How to opt out of an activity
- ☐ How to report a concern

☐ Expectations around respectful behaviour

☐ Physical practice and modifications

☐ Optional excursions and outdoor activities

At the beginning of the retreat

☐ Show students emergency exits and meeting points.

☐ Explain who is available to help.

☐ Explain how to ask questions privately.

☐ Explain how to opt out of activities.

☐ Explain what to do if they feel unwell or distressed.

☐ Explain how to report a safety or safeguarding concern.

A useful reminder is: **“You can pause, modify or leave any practice at any time. You do not need to explain your decision.”**

◆ BEFORE THE RETREAT

11. Safeguarding & professional *boundaries*.

If children or adults at risk may attend:

☐ Do I have an appropriate safeguarding plan?

☐ Have I identified a safeguarding lead?

☐ Do team members know how to report concerns?

☐ Do team members know how to respond to a disclosure?

☐ Do they understand that they should not promise confidentiality?

☐ Is there a process for recording and reporting concerns?

Consider professional boundaries around

☐ Accommodation and room-sharing

☐ One-to-one conversations

☐ Alcohol and social activities

☐ Photography and social media

☐ Physical contact

☐ Confidential information

☐ Romantic or sexual relationships

◆ BEFORE THE RETREAT

12. *Accessibility.*

Don't rely on general statements that a venue is "accessible". Check:

☐ Step-free routes

☐ Accessible bedrooms

☐ Accessible bathrooms

☐ Transport and parking

☐ Seating and rest areas

☐ Lighting

☐ Noise levels

-
- ☐ Sensory considerations
 - ☐ Communication support
 - ☐ Evacuation assistance
 - ☐ Dietary and religious requirements
 - ☐ Whether students can leave an activity discreetly
-

◆ DURING THE RETREAT

13. Daily safety checks during the *retreat*.

Before each day or activity

-
- ☐ Has anything changed since the risk assessment was completed?
 - ☐ Are weather conditions suitable?
 - ☐ Are student support requirements up to date?
 - ☐ Are first-aid arrangements in place?
 - ☐ Are emergency roles clear?
 - ☐ Have there been any supplier or transport changes?
 - ☐ Does everyone know who can pause or change an activity?
 - ☐ Is there a safe alternative if an activity cannot go ahead?
-

During the retreat, continue checking

-
- ☐ Temperature and ventilation
 - ☐ Floors and equipment
-

-
- ☐ Lighting and access routes
 - ☐ Student fatigue and hydration
 - ☐ Weather conditions
 - ☐ Group size and supervision
 - ☐ Staff workload
-

If conditions are no longer safe, pause or change the activity. The timetable should never take priority over student wellbeing.

◆ DURING THE RETREAT

14. Consent during *activities*.

Don't assume that completing a health form or attending the retreat means a student has agreed to every activity.

Before using

-
- ☐ Hands-on adjustments
 - ☐ Sound
 - ☐ Scent or essential oils
 - ☐ Breathwork
 - ☐ Other potentially sensitive activities
-

Make sure you

-
- ☐ Explain what will happen.
 - ☐ Offer a clear choice.
 - ☐ Provide an alternative where possible.
-

-
- ☐ Accept “no” without pressure.
 - ☐ Check consent again if the activity changes.
-

◆ DURING THE RETREAT

15. Food & *allergens*.

If you provide food:

-
- ☐ Do I have accurate ingredient information?
 - ☐ Have I identified potential cross-contamination risks?
 - ☐ Do I have up-to-date allergy information?
 - ☐ Is there a process for recording recipe changes or substitutions?
 - ☐ Are special meals clearly identified?
 - ☐ Have caterers been given the relevant information?
 - ☐ Have I checked that suppliers follow the same procedures?
-

Never guess when a student asks about an allergen. If you don't know, find out before serving the food.

◆ DURING THE RETREAT

16. If an incident *happens*.

If something goes wrong:

-
- ☐ Protect the student and others from immediate danger.
 - ☐ Call emergency services if required.
 - ☐ Provide first aid only within your training and competence.
-

-
- ☐ Follow the emergency plan.
 - ☐ Assign clear roles.
 - ☐ Contact the venue or relevant supplier.
 - ☐ Contact your insurer where appropriate.
 - ☐ Record what happened factually.
 - ☐ Record times and actions taken.
 - ☐ Secure relevant photographs, messages and documents.
 - ☐ Avoid speculation or assigning blame.
 - ☐ Follow up with the student appropriately.
-

Keep incident records **factual, respectful and proportionate**. Avoid recording unnecessary medical information.

◆ AFTER THE RETREAT

17. After the *retreat*.

Team debrief

-
- ☐ What worked well?
 - ☐ Did the risk assessment reflect what actually happened?
 - ☐ Were responsibilities clear?
 - ☐ Could students find help easily?
 - ☐ Were any activities unclear or unsuitable?
 - ☐ Were there any unexpected difficulties?
 - ☐ Did any venue or supplier issues affect safety?
-

☐ Were incidents and concerns recorded correctly?

☐ What should change before the next retreat?

Update your

☐ Risk assessment

☐ Emergency plan

☐ Student information

☐ Supplier agreements

☐ Safety procedures

◆ AFTER THE RETREAT

18. Feedback & *complaints*.

☐ Have I provided a clear way for students to give feedback?

☐ Is there a clear process for raising concerns?

☐ If feedback is given verbally, have I recorded it appropriately?

☐ Have I listened without becoming defensive?

☐ Have I acknowledged the concern?

☐ Have I recorded the action taken?

Consider whether feedback identifies

☐ A gap in pre-retreat information

☐ An accessibility issue

- ☐ A consent or boundary concern
- ☐ A supplier problem
- ☐ A safeguarding concern
- ☐ A risk requiring stronger controls

◆ AFTER THE RETREAT

19. Record *keeping*.

Keep relevant records securely, including:

- ☐ Risk assessments
- ☐ Safety plans
- ☐ Insurance documents
- ☐ Supplier checks and contracts
- ☐ Team briefing notes
- ☐ Student attendance records
- ☐ Health and accessibility information
- ☐ Consent records
- ☐ Incident reports
- ☐ Complaints and responses
- ☐ Post-retreat review notes

Remember: **Keep information only for as long as you have a clear reason to retain it, and restrict access to those who need it.**

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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YogaPros Learning Hub — Compliance & Safety

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