



legal documents for hosting workshops & retreats

podcast episode 60 tip sheet

Hosting a live 1-day workshop or an overnight retreat at a beach resort or swanky hotel is a fun and effective way to build relationships among your tribe members, facilitate deep work and create community. But what legal documents should you use when you're hosting a 1-day event or an overnight retreat?

I know it can feel scary holding a live event – like a yoga class, a smoothie seminar or a day-long workshop – wondering if you're exposing yourself to risk. Some people get stuck or hide and don't schedule live events (even though they are DYING to do it!) because they don't have any legal protections in place. They don't put themselves out there because they're afraid of what might happen.

"What if someone hurts themselves in my yoga class? What if I hold a Supergreen Smoothie Seminar where I teach students how to make green smoothies using almond milk or cashew milk and someone has an allergy to nuts that they don't tell me about? What if I'm holding a Desire Map workshop helping people to go deep into their desires and identify their core desired feelings – I don't want them to think I'm a therapist!"

What legal document should you use for a seminar or 1-day event?

If you're hosting a seminar, workshop, in-person class or 1-day event, the legal document you'll want to use is what I call an Event Waiver. This is generally a 1-2 page document that is best used for events that go for just a few hours up to 1 day long.

Why do you need an Event Waiver?

This Event Waiver is like a Disclaimer that you use when you are LIVE and in person with attendees and it covers you when they are MOVING their bodies, STRETCHING their minds, and EXTENDING themselves in physical or mental ways. You are assuring that they are voluntarily participating in the event, assuming the risks of being part of the event, and disclaiming your liability, making sure they understand "the rules" about the event activities. This is a written release and waiver that is your foundational level of legal protection for a live event. It's a written document that your attendee signs and gives back to you BEFORE or at the VERY START of the event to show they agree to your policies.

An Event Waiver protects you in 3 ways:

1. It stops you from worrying about having NOTHING legal in place to protect you so you feel safe to hold your live event.
2. It sets the ground rules around liability so everyone is on the same page and aware of the risks they are taking when they participate.
3. It creates boundaries and avoids confusion so nothing is ambiguous.

Getting your Event Waiver helps you RELAX and NOT WORRY so you can get on with your mission of hosting your event.

WHEN do you need to use an Event Waiver?

Basically, if you have ANY kind of live-in person event that you host and conduct, you need your participants to sign an Event Waiver BEFORE they arrive – either through an electronic signature program or they can sign it and scan it back to you – or they can sign it the minute they walk in the door to the registration table upon their arrival. Have an Event Waiver signed by each and every event participant before they head into the room and find a seat.



Learn more about a
DIY Event Waiver at
lisafraley.com/diydiyeventwaiver

How does your Event Waiver support you in energetic ways?

When you don't feel safe and secure, you feel on guard which creates energetic blocks in your **root chakra**. When your energy is blocked in your root chakra, which is located at the base of your spine, you feel uneasy and you tend to stay small and scared, keeping you from having the events and workshops that you envision. Using an Event Waiver can help you not feel scared.



What legal document should you use when hosting an overnight retreat or longer event?

If you're hosting an in-person overnight retreat, Mastermind, or an event that's a few days long – whether in the US or somewhere around the world - you'll want to use an what I call an Overnight Retreat Agreement. This Overnight Retreat Agreement is an actual contract that covers everything pertaining to the retreat – including how much it costs, whether you give refunds, it disclaims and limits your liability where you need to. It is more comprehensive and different than the Event Waiver.

For example, when you think about accommodations or travel or transportation - or passports and visas, if your retreat is international - your Overnight Retreat Agreement is the document you use with attendees that covers things like lodging, excursions, food, transportation and more. Even when you want your attendees to pay for their OWN lodging and transportation – and it's not included in the retreat price - you need to be super-clear IN WRITING about what's included and what's not included around lodging, transportation, travel documents, and more.

If you have excursions like ziplining across the jungle in Costa Rica or in the mountains of British Columbia (I have done ziplining in both places and it's exhilarating but it is also terrifying at first) or maybe you're taking everyone dining on a catamaran yacht in New Zealand like my husband and I will be doing this fall through Mike Dooley's Adventure Travel Program and I cannot wait!), you want to be sure that your participants have agreed to assume the risks of these excursions and are voluntarily attending them with full awareness that something could happen that you as the Event Host cannot possibly control.

If everyone piles into vans or limos and you drive them to the trailhead to hike up a volcano or to start their ziplining adventure, your retreat participants should consent in writing to being transported from the event location to the event excursion by the limo company. You want your participants to know and agree that they are voluntarily participating in the retreat, you want to disclaim your liability and make sure they understand "the rules" about participation in event activities and what they need to keep track of.



**Learn more about a
DIY Overnight Retreat Agreement at
lisafraley.com/diyoovernightretreatagreement**

Here are 5 other types of legal documents you might need to use as an Event Host:

1. Accommodations or the event/retreat location contract

If you're renting space at a swanky high-end hotel, a decadent spa, a yoga studio or health club, an old converted warehouse, a local library, or some other event space owned by a business or the government, you want to be sure you're using a written contract between you and the business owner (or the management of the space) to rent the space.

This contract should include the date and time of the event but also the dates and times you'll have ACCESS to the space for set-up and clean-up before the attendees arrive and after they leave. It should also include the cost of the rental, when payment is due, who's responsible for the event set-up and clean-up setting up tables and chairs and other items, what about trash removal, and what about other logistics like audio/visual needs (like screens, microphones and projectors), and what you are allowed and aren't allowed to do on the premises in the space. You also want to be sure you address cancellation if you or the event location needs to cancel the event with short notice.

2. Catering & food service contract

If you plan to have food and drink served at your event – whether that's a full-blown catered lunch of gorgeous salads with orchids in them or just a coffee & tea station with gluten-free cookies and snacks, you want a written contract with the caterer. Sometimes, the caterer will be the event location's kitchen and staff, but other times, you'll be bringing in an outside caterer. Be sure that your written contract includes the number of people you'll be serving, the cost per person, how many staff members they'll have present, when they'll need to get access to the space to do set-up and clean-up, when payment is due, any cancellation policies, how to address food allergies/sensitivities and any accommodations for special diets, and whether you can request specific items be served for meals or snacks, and more.

I spoke at Dr. Keesha Ewers' event in Seattle last year and she impressively worked with the hotel to serve all of us a coffee alternative made of nuts with vanilla collagen protein at breakfast. Not every hotel is willing to make those kinds of accommodations, so you want to be crystal clear up front about what you would like and what they're willing to do. Food is a huge part of an event and you want to be as clear as possible about food service up front with your caterer.

3. Excursions contract

If you're planning excursions, talk to the excursion host and find out whether you need to sign an agreement for bringing a group and/or whether the event participants also need to sign their own disclaimers or waivers with the excursion company when you arrive. Get clear up front how payment works for a group and what legal documents you and your attendees need to sign.

4. Transportation contract

Does the limo company you're using require that you sign an agreement up front when you book the limos? Do they take a deposit to secure the time and date that you need the limos? What happens if you have to cancel the limos or fewer people come to your event than you initially told them would be there and you don't need as many limos as you originally thought? How does that work? How does that affect payment and so on?

5. Guest presenter contract

If you have guest presenters who are teaching your 6:00 Wake Up with Yoga Classes or an afternoon relaxing meditation class, you'll likely want to use a written agreement with those guest presenters also so that you're both on the same page about what you expect from them, when they need to be there, what equipment they'll bring or whether you need to inform your participants to bring their own yoga mats, for example, and more.

ENERGETICALLY, all of these Agreements relate to your 2nd chakra. Anything related to creativity, abundance, income, self-expression, joy, pleasure, and MONEY – are all affiliated with the 2nd chakra, the **sacral chakra**. Retreats are not inexpensive to host and you need to be sure you're protecting your income because it's likely that you will be making deposits or payments to the hotel or resort to secure the space BEFORE your event attendees even sign up for the event. To make sure you aren't out the dough, it's good to have agreements for when they go. (Hey, that rhymes!)



Do you have other questions about agreements as they relate to hosting your own events and retreats? Feel free to reach out to me at clientlove@lisafraley.com. I'm always happy to help you however I can and point you in the right direction.

Here's to getting legally enlightened!

With Legal Love™,

A handwritten signature in black ink that reads "Lisa". The signature is written in a cursive, flowing style.

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It is not legal advice and it does not create an attorney-client relationship.**

For my full disclaimer, please visit lisafraley.com/disclaimer.



Lisa Fraley, JD, CHHC, AADP, is an acclaimed attorney, Legal Coach®, speaker and #1 Best Selling Author of "Easy Legal Steps...That are Also Good for Your Soul." With her unique blend of coaching, legal expertise, and spirituality, Lisa has supported thousands of heart-centered entrepreneurs and small business owners to protect themselves, their businesses and their brands through DIY legal templates, online legal courses and one-on-one services.

From sharing international stages with thought leaders like Kris Carr and Gabrielle Bernstein to being featured on hundreds of podcasts, webinars, radio shows and bonus calls, Lisa has made it her mission to help every single small business owner understand that the law can be accessible, empowering, loving, and even spiritual. When she's not saving the world (with Legal Love) one contract at a time, she's posting free legal tips and connecting with her tribe at lisafraley.com.