



SOP-07 | Lab-in-the-Field Experiments

Standard Operating Procedure

Document	SOP-07
Status	Draft for internal approval
Version	0.1
Effective date	Upon approval
Owner	BEER Lab Manager
Review cycle	At least annually
Applies to	Projects and personnel within the scope of this SOP

Behavioral & Experimental Economics Research Lab · Tecnológico de Monterrey

1. Purpose

Set standards for experiments that use controlled laboratory-style tasks in natural settings such as schools, communities, workplaces, public institutions, or temporary field sites.

2. Required Field Session Protocol

- Site authorization and local contact.
- Participant recruitment and eligibility.
- Session layout, privacy, seating, and crowd control.
- Participant IDs and repeat-participation checks.
- Devices, chargers, batteries, hotspot/offline procedures, and backups.
- Staffing roles, scripts, consent, and troubleshooting.
- Cash or electronic-payment security and reconciliation.
- Equipment transport, storage, and incident response.

3. Pilot

Conduct a realistic pilot outside the main analytical sample whenever feasible. The pilot should reproduce the actual venue, devices, instructions, payment flow, timing, participant movement, and data synchronization.

4. Staff

- Every session has a named Session Lead.
- Facilitators and enumerators must be trained on consent, privacy, standardized instructions, participant identification, payments, and incident escalation.
- Staff may not alter treatments or instructions to solve operational inconveniences.

5. Privacy and gatekeepers

Teachers, supervisors, community leaders, employers, or other gatekeepers should not observe individual choices or earnings unless this is required by the approved design. Participation decisions should not be disclosed to gatekeepers where disclosure could create pressure or retaliation.

6. Connectivity and devices

The protocol must define what happens when internet access fails. Offline data must be encrypted or otherwise protected and synchronized as soon as secure connectivity is available. Lost or stolen devices are incidents under SOP-10.

7. Payments

Payments should be private, context-appropriate, and reconciled daily when field teams handle cash or high volumes of electronic transfers.

8. Records

- Field Session Protocol
- Staff roster and training record
- Pilot record
- Session log
- Payment reconciliation
- Device inventory
- Deviation/incident log

9. Related documents

- SOP-04 Participant Compensation
- SOP-08 Field Experiments
- SOP-09 Data Protection and Participant IDs
- SOP-10 Incident Reporting