

TERMS OF REFERENCE (TOR)

Engagement of a Third-Party Service Provider for the JHMC Client Satisfaction Measurement (CSM) for CY 2026

I. RATIONALE AND BACKGROUND

The John Hay Management Corporation (JHMC), a subsidiary of the BCDA, acts as the estate manager and regulatory body for the John Hay Special Economic Zone (JHSEZ) and the John Hay Reservation Area (JHRA). To ensure transparency and responsiveness, JHMC is mandated by **RA 10149** and **RA 11032** to establish a harmonized feedback mechanism.

This 3rd-party engagement is necessary because the magnitude and technical expertise required to interpret and generate CSM results—including adherence to specific ARTA and GCG templates—currently exceed JHMC's in-house capacity.

II. COMPREHENSIVE SCOPE OF WORK

The Service Provider shall perform the following duties and responsibilities:

- **Administration:** Conduct the CSM for both internal and external services strictly following ARTA M.C. No. 2022-05 and GCG-ARTA Joint M.C. No. 1 series of 2023.
- **Technical Execution:** Identify eligible respondents based on the JHMC Updated Citizen's Charter and develop stimulus materials and survey instruments.
 - Conduct rigorous training for enumerators and provide a comprehensive Training Manual and Report.

- Implement field supervision, back-checking, and spot-checking to ensure data quality.

- **Analytics:** Generate, interpret, and analyze data to provide actionable insights for JHMC's operational excellence.
- **Confidentiality:** Maintain utmost confidence for all gathered documents and information, extending beyond the contract termination.

III. PROJECT DESIGN AND METHODOLOGY

The project must adhere to a standardized framework to ensure a meaningful client-centered Citizen's Charter.

- **Core Measure:** The primary success metric is the percentage of respondents rating "Agree" (4) or "Strongly Agree" (5) for Service Quality Dimension 0: *"I am satisfied with the service that I availed"*.
- **Standardization:** Use the prescribed English and Tagalog versions of CSM questions as amended by ARTA M.C. No. 2023-05.

IV. ESTIMATED PROJECT COST AND PAYMENT SCHEDULE

The Approved Budget for the Contract (ABC) is **Php 500,000.00**, inclusive of all applicable taxes and fees. The provider assumes all logistical costs, including team salaries, meals, and transportation.

OUTPUT/ MILESTONE	DUE DATE	PAYMENT (%)
Q1 Collated Responses & Improvement Discussion	April 15, 2026	20%
Q2 Collated Responses &	July 15, 2026	20%

Improvement Discussion		
Q3 Collated Responses & Improvement Discussion	October 15, 2026	20%
Final Comprehensive Report & Analysis	January 15, 2027	40%

V. TECHNICAL CRITERIA FOR EVALUATION

Proposals will be evaluated using the **Quality-Cost Based Evaluation (QCBE)** method with a minimum passing rate of **80%**.

- **Applicable Experience (40%):** Evaluates years in the industry (maximum points for >8 years) and similar projects conducted within the last two years.
- **Qualification of Personnel (40%):** Requires members with hands-on experience in CSS/CSM administration, public sector expertise, and a minimum of a Bachelor's Degree.
- **Financial Proposal (20%):** Assessment of the proposed cost against the ABC.

Detailed evaluation criteria are provided in the table below:

Evaluation Criteria	Weight
Technical Proposal	

<p>a. Applicable experience and Track Record (At least 1 from the survey)</p> <ol style="list-style-type: none"> No. of Years of experience – 20% <ul style="list-style-type: none"> More than eight (8) years – 20% More than five (5) years but less than eight (8) years – 18% Four (4) to five (5) years – 15% Less than four (4) years – 12% Similar Projects conducted for government and / or private institutions within the last two (2) years – 10% <ul style="list-style-type: none"> With at least two (2) similar projects within the last two (2) years – 10% With at least one (1) similar project within the last two (2) years – 5% Client Feedback – 10% <ul style="list-style-type: none"> With “Outstanding” rating/s in the similar project/s completed within the last two (2) years – 10% With no “Outstanding” rating/s in the similar project/s completed within the last two (2) years – 5% 	<p>40%</p>
<p>b. Qualification of the Consultant</p> <ol style="list-style-type: none"> Members with solid hands-on experience in the administration of Customer Satisfaction Surveys or Measurements – 10% <ul style="list-style-type: none"> With at least two (2) Members with solid hands-on experience in 	<p>40%</p>

the CSS/CSM administration - 10%

- With at least one (1) Member with solid hands-on experience in the CSS/CSM administration - 7%
- No Member with solid hands-on experience in the CSS/CSM administration - 4%

2. Members with relevant public sector-specific experience and/or similar or related nature to JHMC Operations (Public Administration; Regulatory Agency) – **10%**

- With at least two (2) Members having relevant public sector-specific experience and/or similar or related nature to JHMC Operations - 10%
- With at least one (1) Member having relevant public sector-specific experience and/or similar or related nature to JHMC Operations - 7%
- With no Member having relevant public sector-specific experience and/or similar or related nature to JHMC Operations - 4%

3. Members have a minimum of two (2) year's survey experience– **10%**

- at least 50% of the Members having a minimum of two (2) year's survey experience - 10%

<ul style="list-style-type: none"> - less than 50% of the Members having a minimum of two (2) year's survey experience - 5% <p>4. Educational Attainment / Applicable accreditation of audit team members – 10%</p> <ul style="list-style-type: none"> - 100% of the Members are at least Bachelor's Degree holders and at least 50% have accreditation of audit team members - 10% - 100% of the Members are at least Bachelor's Degree holders and below 50% have accreditation of audit team members - 5% 	
Financial Proposal	20%
TOTAL	100%

VI. IDENTIFIED RISKS AND MITIGATION

Data Quality Risk: Mitigation through mandatory back-checking, spot-checking, and the submission of a Data Quality Control Report.

Delivery Risk: Adherence to a strict timeline for quarterly reporting to ARTA.

Administrative Risk: Clear distinction that no employer-employee relationship exists between the provider and JHMC.

VII. MODE OF PROCUREMENT

Under the **New Government Procurement Act (NGPA)**, or **Republic Act No. 12009**, this project will fall under **Small Value Procurement (SVP)**.

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