

e-Circular
State Bank Of India
All LHO/ Central Office Establishments

**REVIEW OF PROMOTION POLICY : CLERICAL TO OFFICERS CADRE
AND SUBORDINATE TO CLERICAL CADRE**

Please refer to our Circular No. CDO:IR:CIR:22 dated 31st July, 2003 wherein it was advised that a promotion policy for clerical staff for promotion to Trainee Officer and Officer JMGS I cadre was evolved through a Memorandum of Settlement dated 22nd July 2003 signed with All India SBI Staff Federation.

2. While carrying out the promotions from clerical cadre to Trainee Officer/Officer JMGS-I, it was observed during last two years that sufficient number of candidates could not be promoted. The main reason for this was non-availability of sufficient number of candidates under Fast Track/Merit channels under which 85% vacancies were reserved. As against this, although a large number of candidates were available under the seniority channel, only 15% vacancies could be filled through this channel.

3. Similarly, while carrying out the promotions from subordinate to clerical cadre in terms of Promotion Policy for Subordinate Staff evolved vide Memorandum of Settlement dated 27th December 2005, it was observed that very few candidates qualified in the written examination under Merit channel due to fixing up of the upper age limit of 45 years. Though a large number of candidates who qualified under normal channel were matriculate, they were not eligible for promotion under merit channel due to age limit of 45 years and had to be promoted as cashiers under normal channel, thereby restricting their utility.

4. Therefore, a need was felt to review the promotion policy for clerical cadre to JMGS I and Trainee Officers cadre and promotion policy for subordinate to clerical cadre. The norms for conversion of cashiers to clerks are also required to be reviewed so that the services of cashiers who are matriculate can be used for clerical work also.

The All India SBI Staff Federation has also requested to review the above promotion policies keeping in view present requirement of Bank. The matter was discussed with the Staff Federation and a Memorandum of settlement was signed on 16.04.2008 on the revised promotion policy for workmen staff. A copy of which is enclosed for your perusal and necessary action.

5. Further, the Executive Committee of Central Board in its meeting held on 24th April, 2008 has approved the revised promotion policy, the main features of the proposed changes in the existing promotion policies are as follows:-

(A) For promotion to Trainee officer cadre

- Minimum service changed from 2 years to 3 years.
- Upper age limit increased from 35 years to 40 years for General candidates and for SC/ST candidates from 40 years to 45 years.
- Number of chances increased from 3 to 5
- Weightage of 10 marks for professional qualification such as CAIIB/DBM etc.

(B) For promotion to JMGS-I cadre

Merit channel

- Upper age limit increased from 40 years to 45 years for General candidates and for SC/ST candidates from 45 years to 50 years.
- Number of chances increased from 4 to 6 (or till he reaches prescribed age limit whichever is earlier).
- 30% vacancies will be filled-up under this channel.

Normal cum Seniority channel

- Existing 2 channels viz. Normal channel and Seniority channel have been merged to Normal cum Seniority channel.
- Upper age limit increased from 45/50 years to 52 years for General candidates and similarly for SC/ST candidates from 50/55 years to 57 years.
- Number of chances increased:- Till he reaches upper age limit
- Weightage of marks for seniority reduced from 20 to 15.
- 70% vacancies will be filled-up from this channel.

Other features:-

- Unfilled vacancies in Merit channel, if any, will be filled from Normal cum Seniority channel.
- An option letter will be obtained from all the candidates appearing for the interview seeking their willingness for being considered for posting in deficit Circles in case they do not find a place in the select list of promotion for the parent Circle subject to they being otherwise considered suitable for promotion. Bank reserves its right to allocate them to any of the deficit Circles.
- Eligibility criteria viz. age, minimum service, minimum qualification, additional qualification for the promotion under both the channels will be as on 1st April of promotion year.
- The pattern of examination will be advised separately.

(C) For promotion from subordinate to clerical cadre

- Matriculates will be eligible for Merit channel while 8th standard pass will be eligible under Normal channel.
- Upper age limit increased to 55 years of age.
- Matriculates on promotion will be designated as clerks and 8th standard pass will be designated as cashiers.
- Number of chances:- Till he reaches 55 years of age.
- Eligibility criteria viz. age, minimum service, minimum qualification, additional qualification for the promotion under both the channels will be as on 1st April of promotion year.
- The written examination will be held on General Banking, English language, General awareness and computer aptitude. The Pattern of the written examination will be advised separately.
- All newly promoted cashiers if they pass 10th standard exam will be converted as clerks after 2 years of satisfactory service as cashiers as on 1st August of each year .
- All the existing Record Keepers, Record Keepers-cum-Cashiers, Godown Keepers, Bill Collectors and Cashiers promoted from Subordinate cadre who have completed two years of service and are matriculate (S.S.C.) as on 1st August, 2008 may be converted as clerks by the controlling authority subject to their satisfactory work. If an employee is not willing to be converted as clerk, he has to furnish a written request to the Branch Manager/Head of Department within 7 days after receipt of conversion letter. The controller's decision in this regard will be final. The converted employees will have to perform the duties of clerk or cashier or both clerk-cum-cashier as per requirement of the Bank.

6. OTHER GUIDELINES FOR ALL PROMOTIONS

The promotion policy will be implemented from the current financial year. It is expected that the promotional exercise will start by the 2nd week of May, 2008. Since all the promotions will be based on written test and interview as per revised eligibility criteria please arrange to make an assessment of the number of employees who are not covered by the debarment policy and will be eligible to write the test. Please also make arrangement for the pre-promotional training to the SC/ST candidates as per extant instructions in this regard.

7. The details of revised policies for promotion from clerical cadre to Trainee officer/JMGSI and subordinate cadre to clerical cadre are placed at Annexure A, B & C respectively.

8. Please bring the contents of this circular to the notice of all concerned.

Yours faithfully,

for Dy. Managing Director &
Corporate Development Officer

Annexure 'A'

POLICY FOR PROMOTION FROM CLERICAL TO TRAINEE OFFICER

- (i) **Eligibility** :- All clerical cadre employees (excluding Record Keepers, Record Keepers-cum-Cashiers, Godown Keepers, Bill Collectors and Cashiers promoted from Subordinate cadre) fulfilling following eligibility criteria will be eligible to appear for the test for promotion as Trainee Officer.
- (ii) **Minimum service** :- 3 years (for both General as well as SC/ST employees) as on 1st April of the promotion year.
- (iii) **Minimum Qualification** :- Graduation from a recognised university as on 1st April of the promotion year.
- (iv) **Upper age limit** :- General candidates: not exceeding 40 years, SC/ST candidates : 45 years as on 1st April of the promotion year.
- (v) **Number of chances** :- There will be 5 chances. A candidate may appear for the test 5 times or till he reaches the prescribed age limit, whichever is earlier.
- (vi) **Allocation of marks** :-
- | | | |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| (a) | Written test | 60 marks |
| (b) | Performance appraisal | 10 marks |
| (c) | Additional Qualification viz.
CAIIB(Part-I/II), MBA,
Diploma in Banking, Finance, HR,
Business Management, Marketing, Treasury,
Intermediate CA/ICWA. | 10 marks |
| (d) | Personal Interview | <u>20 marks</u> |
| | TOTAL | <u>100 marks</u> |
- (vii) **Qualifying marks** :-
- (a) **Written Test** :- Minimum 65% for General candidates and 60% for SC/ST candidates.
- (b) **Personal Interview** :- Minimum 40% for General candidates and 35% for SC/ST candidates (minimum 8 marks out of 20 for General candidates and 7 marks out of 20 for SC/ST candidates).
- (viii) **Vacancies** :- As sanctioned by Corporate Centre.
- (ix) **Zone of Selection** :- Based on the performance in the written test, candidates will be called for interview in the ratio of 2 candidates for every vacancy in the descending order of merit. This will form the zone of selection.

Annexure 'B'

POLICY FOR PROMOTION FROM CLERICAL TO JMGS-I –MERIT CHANNEL

- (i) **Eligibility** :- All clerical cadre employees (excluding Record Keepers, Record Keepers-cum-Cashiers, Godown Keepers, Bill Collectors and Cashiers promoted from Subordinate cadre) fulfilling following eligibility criteria will be eligible to appear for the test for promotion to JMGS I under the merit channel.
- (ii) **Minimum service** :- 6 years (for both General as well as SC/ST employees) as on 1st April of the promotion year.
- (iii) **Minimum Qualification** :- Matriculation (10th standard pass from a recognised Board) as on 1st April of the promotion year.
- (iv) **Upper age limit** :- General candidates : not exceeding 45 years, SC/ST candidates : 50 years as on 1st April of the promotion year.
- (v) **Number of chances** :- There will be 6 chances. A candidate may appear for the test 6 times or till he reaches the prescribed age limit, whichever is earlier.
- (vi) **Allocation of marks** :-
- | | | |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| (a) | Written test | 60 marks |
| (b) | Performance appraisal | 10 marks |
| (c) | Additional Qualification viz.
CAIIB(Part-I/II), MBA,
Diploma in Banking, Finance, HR,
Business Management, Marketing, Treasury,
Intermediate CA/ICWA. | 10 marks |
| (d) | Personal Interview | <u>20 marks</u> |
| TOTAL | | <u>100 marks</u> |
- (vii) **Qualifying marks** :- There will be minimum qualifying marks as under :-
- (a) **Written Test** :- Minimum 55% for General candidates and 50% for SC/ST candidates.
- (b) **Personal Interview** :- Minimum 40% for General candidates and 35% for SC/ST candidates (minimum 8 marks out of 20 for General candidates and 7 marks out of 20 for SC/ST candidates).
- (viii) **Vacancies** :- 30% of total JMGS-I vacancies excluding Trainee Officers vacancies sanctioned by Corporate Centre for the promotion year will be filled-up through this channel. Unfilled vacancies if any, will be filled up from Normal-cum-Seniority channel in the same promotion year.
- (ix) **Zone of Selection** :-Based on the performance in the written test, candidates will be called for interview in the ratio of 2 candidates for every vacancy in the descending order of merit. This will form the zone of selection.

**POLICY FOR PROMOTION FROM CLERICAL TO JMGS-I –
NORMAL-CUM-SENIORITY CHANNEL**

- (i) **Eligibility** :- All clerical cadre employees (excluding Record Keepers, Record Keepers-cum-Cashiers, Godown Keepers, Bill Collectors and Cashiers promoted from Subordinate cadre) fulfilling following eligibility criteria will be eligible to appear for the test for promotion to JMGS I under the normal-cum-seniority channel.
- (ii) **Minimum service** :- 12 years (for both General as well as SC/ST employees) as on 1st April of the promotion year.
- (iii) **Minimum Qualification** :- Matriculation (10th standard pass from a recognised Board) as on 1st April of the promotion year.
- (iv) **Upper age limit** :- General candidates and SC/ST candidates : should not be more than 52 years and 57 years respectively as on 1st April of the promotion year.
- (v) **Number of chances** :- A candidate may appear for the test till he/she reaches the upper age limit.
- (vi) **Allocation of marks** :-
- | | | |
|-----|-----------------------|-------------------------|
| (a) | Written test | 55 marks |
| (b) | Performance appraisal | 10 marks |
| (c) | Seniority | 15 marks * |
| (d) | Personal Interview | <u>20 marks</u> |
| | TOTAL | <u>100 marks</u> |
- * One mark for each completed year of service after completion of 12 years, maximum 15 marks.
- (vii) **Qualifying marks** :-
- (a) **Written Test** :- Minimum 45% for General candidates and 40% for SC/ST candidates.
- (b) **Personal Interview** :- Minimum 40% for General candidates and 35% for SC/ST candidates (minimum 8 marks out of 20 for General candidates and 7 marks out of 20 for SC/ST candidates).
- (viii) **Vacancies** :- 70% of total JMGS-I vacancies excluding Trainee Officers vacancies sanctioned by Corporate Centre for the promotion year will be filled-up through this channel.
- (ix) **Zone of Selection** :-Based on the performance in the written test, candidates will be called for interview in the ratio of 2 candidates for every vacancy in the descending order of merit. This will form the zone of selection.

GENERAL (APPLICABLE TO PROMOTION UNDER ALL CHANNELS)

- (i) For all channels of promotion, merit list will be prepared on the basis of aggregate marks obtained in written test, performance appraisal, additional qualifications, seniority and personal interview and candidates equal to the number of vacancies from the top will be selected.
- (ii) Date of declaration of result will be reckoned as the date of promotion under all the channels.
- (iii) In order to enable the employees to improve their performance, marks secured by candidates in the written test will be advised.
- (iv) The candidate will have to appear for both the written test and the interview to qualify for promotion.
- (v) In case more than one candidate secures equal/same marks in the final merit list against the last vacancy, all such candidates will be promoted. Promotions thus made in excess of available sanctioned positions, will be adjusted against future vacancies.
- (vi) The existing debarment policy will be applicable for all promotions. The employees debarred for promotion as a result of disciplinary action (contemplated/pending/concluded) will not be considered for promotion until the period of rigour is over.
- (vii) The concessions/relaxations available to SC/ST employees etc. for out-of-cadre promotions in terms of Government/IBA guidelines, as applicable from time-to-time will be adhered to. However, if any doubt regarding any concession/relaxation on interpretation arise/to be made, the matter will be referred to Government of India/IBA and their advice will be final and binding on both the parties. Concession available to Ex-servicemen employees etc. as per Government guidelines will continue to be available.
- (viii) If a candidate does not appear for the written test and/or interview, it will not be counted as having exhausted a chance. He can appear upto the prescribed number of chances within the respective age limit as per his choice.
- (ix) Persons with disabilities (PWDs) /women candidates who are more than 50 years of age if promoted, will not be transferred outside the network.
- (x) If the sufficient number of candidates are not found successful under the merit channel, the unfilled vacancies may be filled from Normal-cum-Seniority channel in the same promotion year.
- (xi) Eligibility criteria viz. age, minimum service, minimum qualification, additional qualification for the promotion under all the channels will be as on 1st April of promotion year.
- (xii) An option letter will be obtained from all the candidates appearing for the interview seeking their willingness for being considered for posting in deficit Circles in case they do not find a place in the select list of promotion for the parent Circle subject to they being otherwise considered suitable for promotion. Bank reserves its right to allocate them to any of the deficit Circles.

- (xiii) It is expected that the candidates posted out side the Circles acquire the working knowledge of the regional language with in a period of six months.
- (xiv) Persons with disabilities (PWDs) are also eligible for promotion to TO/JMGS-I if otherwise they fulfil the eligibility criteria applicable for general candidates prescribed for such post/posts.

Annexure 'C'

**POLICY FOR PROMOTION FROM SUBORDINATE TO CLERICAL CADRE
MERIT CHANNEL - CLERKS**

- (i) **Eligibility** :- Permanent full-time employees with 5 years' service as on 1st April of the promotion year. However, service put in as a permanent part-time employee prior to full-time appointment will be reckoned proportionately by notionally converting part-time service into full-time service, in case such a full-time employee has less than 5 years' service as on 1st April of promotion year. (Temporary service will not be reckoned)
- (ii) **Minimum Qualification** :- Matriculation or equivalent examination on 1st April of the promotion year.
- (iii) **Upper age limit** :- 55 years as on 1st April of promotion year.
- (iv) **Number of chances** :- Till he completes 55 years of age.
- (v) **Allocation of marks** :-

(a)	Written test		
	- General Banking	-	30
	- English language	-	10
	- General Awareness	-	10
	(100 Ques. 90 mins. ½ mark each)-		<u>50</u>
(b)	Written test on computer aptitude -		<u>25</u>
	(50 Ques. 45 mins. ½ mark each)		
(c)	Additional Qualification (graduation)-		5
(d)	Performance Appraisal	-	10
(e)	Personal Interview	-	<u>10</u>
	Total Marks		<u>100</u>

- (vi) **Qualifying marks** :-

Written Test :- Minimum 40% in written examination and also 40% minimum marks in computer aptitude test.

Personal Interview :- Minimum 40% (i.e. 4 marks out of 10 marks for General and SC/ST).

- (vii) **Zone of Selection**:-Based on the performance in the written test on both Banking, English, General awareness and computer aptitude, candidates will be called for interview in the ratio of 3 candidates for every two vacancies, in the descending order of merit. This will form the zone of selection.

**POLICY FOR PROMOTION FROM SUBORDINATE TO CLERICAL CADRE
NORMAL CHANNEL-CASHIERS**

- (i) **Eligibility** :- Permanent full-time employees with 8 years' service as on 1st April of the promotion year. However, service put in as a permanent part-time employee prior to full-time appointment will be reckoned proportionately by notionally converting part-time service into full-time service, in case such a full-time employee has less than 8 years' service as on 1st April of promotion year. (Temporary service will not be reckoned).
- (ii) **Minimum Qualification** :- VIIIth standard passed as on 1st April of the promotion year.
- (iii) **Upper age limit** :- 55 years as on 1st April of the promotion year.
- (iv) **Number of chances** :- Till he/she completes 55 years of age.
- (v) **Allocation of marks** :-

(a) Written test		
- General Banking	-30	
- English language	-10	
- General Awareness	-10	
(100 Ques. 90 mins. ½ mark each)		
		<u>50</u>
(b) Written test on computer aptitude	-	20
(40 Ques. 45 mins. ½ mark each)		
(c) Performance Appraisal	-	10
(d) Personal Interview	-	<u>20</u>
Total Marks		<u>100</u>

- (vi) **Qualifying marks** :-

Written Test :- Minimum 40% in written examination and minimum 30% in computer aptitude test.

Personal Interview :- Minimum 40% (i.e. 8 marks out of 20 marks for General and SC/ST candidates).

- (vii) **Zone of Selection**:- Based on the performance in the written test on both Banking, English, General awareness and computer aptitude, candidates will be called for interview in the ratio of 3 candidates for every two vacancies, in the descending order of merit. This will form the zone of selection.

General Guidelines:- (Applicable for both Merit and Normal Channels)

- (i) Placement will be need based anywhere in the Circle.
- (ii) Eligibility criteria viz. age, minimum service, minimum qualification, additional qualification for the promotion under both the channels will be as on 1st April of promotion year
- (iii) All newly promoted cashiers if they pass SSC will be converted as clerks after 2 years of satisfactory service as cashiers. This exercise will be done on 1st August of each year.
- (iv) All the existing Record Keepers, Record Keepers-cum-Cashiers, Godown Keepers, Bill Collectors and Cashiers promoted from Subordinate cadre who have completed two years of service and are matriculate (S.S.C.) as on 1st August, 2008 will be converted as clerks by the controlling authority subject to their satisfactory work. If an employee is not willing to be converted as clerk, he has to furnish a written request to the Branch Manager/Head of Department within 7 days after receipt of conversion letter. The controller's decision in this regard will be final.

