



Tramway Parts Allocation Policy

Tramway Parts and Equipment for COTMA
Members and others

Version 1.0

Approved by COTMA committee

2nd April 2020

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Version	Date	Author	Comments
0.1	10 Nov 2006	Russell Jones	Initial Draft.
0.2	21 Feb 2008	Warren Doubleday	Revision for comments at meet of 27 Oct. 2007 and inclusion of equipment as well and change of the Spare Parts Committee to the Tramway Equipment and Advisory Committee, general deletion of word "spares".
0.3	25 Feb 2008	Warren Doubleday	Changes suggested by Henry Brittain in email of 25/2.
0.4	26 Feb 2008	Warren Doubleday	Rewrite first dot point on page 4 – re sale to non-COTMA members.
0.5	7 Jan 2020	Mal Rowe	Major update to include the policy developed with VicTrack in 2010 and to cover a broad range of equipment including parts obtained following the re-purposing of the trams stored at Newport Workshops in Victoria.
0.6	9 Jan 2020	Mal Rowe	Revision based on feedback from committee – includes appropriate incorporation for any non full COTMA member and a definition including equipping tramcar bodies in "restoration"
0.7	17 Jan 2020	Mal Rowe	Revision after VicTrack comments – includes more detail on criteria for allocation and Application template.
0.8a	18 Feb 2020	Mal Rowe	Updates and addition of template for application and explanatory notes and elimination of a duplicate clause.
1.0	27 Mar 2020	Mal Rowe	Noted as meeting requirements of VicTrack (Andy Santana email) Approved by COTMA committee 2 April 2020

Document Objective

This document defines the policy regarding allocation of tramway parts and equipment acquired by COTMA for distribution to COTMA members and others.

The primary audience of this document is the COTMA Parts Management Group, the COTMA Executive Committee and COTMA member museums.

The aim of this Policy is to ensure the availability of parts to enable the long-term operation of heritage tramcars through careful management of shared stocks.

Background

COTMA has established a storage facility at the BTM property at Bungaree (Vic) to be used for the storage and distribution of tramcar equipment parts and other tramway related material that has been acquired over an extended period.

Most of the tramway parts and equipment in this facility have been acquired from VicTrack, Yarra Trams and their predecessors. Most of these parts have been acquired at no cost, excluding transport costs.

Under the Victorian Government “Retired Trams Strategy” COTMA will manage a large quantity of spare parts for use by tramway heritage museums. These will be the last such parts available and it is essential that they be allocated fairly and via a process that will see parts available over as long a term as possible.

In addition, the AETM has made available to COTMA a facility at St Kilda (SA) for storage of parts acquired by COTMA as a result of the retiring of Adelaide H class tramcars in 2006. These were purchased by COTMA through a tender process.

1. The Policy

- 1.1. This Tramway Parts Allocation Policy (“The Policy”) is based on a protocol formulated by COTMA and VicTrack in 2010 and ratified at the COTMA conference in 2010. That protocol is available on the COTMA website at: <https://www.cotma.org.au/documents.html>
- 1.2. The protocol was not countersigned by VicTrack, but it remains as the COTMA protocol. This Policy document has been approved by VicTrack as meeting its requirements. It was approved at the COTMA Executive Meeting held on 2 April 2020.
- 1.3. The Policy is applicable to tram spare parts that have been obtained by Council of Tramway Museums of Australasia (COTMA) members by virtue of the donation of such material by VicTrack on behalf of the Victorian Government and by other government sources.
- 1.4. It is not applicable to parts owned by individual museums.
- 1.5. The parts include tram body parts and mechanical and electrical equipment removed from trams provided by VicTrack for use in heritage tram operations.

- 1.6. Execution of the Policy will be managed by the Parts Management Group, as established by the COTMA Committee.
- 1.7. Requests from COTMA member tramways for parts and infrastructure items are required to be directed to the Parts Management Group via the COTMA secretary. The COTMA secretary or his/her nominee is secretary to the parts group. The application must include justification of current or near future needs. The COTMA Application template for such applications is attached as Appendix 1 to this document. Applications for building up stocks of spares for long term use in a particular museum will not be considered, but it is recognised and supported that heritage tramways with intense operations – sometimes 7 days a week – will need to hold some key spares ‘in stock’.
- 1.8. In the case of very large items, such as trucks (bogies) the Parts Management Group may suggest to the COTMA Committee that they be immediately allocated to particular museums who have storage capacity. Such allocations are still subject to the Principles below.
- 1.9. In this document, ‘restore’ covers all aspects of equipping a heritage tramcar for display or operation, including equipping a ‘bare bones body’ to make it operable.
- 1.10. In the event of competing applications for parts provided by VicTrack if competing applications are equal in terms of all other criteria in the Application Template, a Victorian Museum will take priority in allocation.

2. Principles for Parts Management

It is agreed by COTMA members who receive equipment or items under the Policy that:

- 2.1. The equipment and items are held in trust by COTMA members until such time as they are installed into a tramcar. If they are not installed within a reasonable time, COTMA may request that they be returned as noted below in clause 2.2. Once installed, they become part of the tramcar and are owned by the COTMA member as part of their tram. The Parts Management Group will maintain records of what parts are in trust and note when they have been passed into ownership by a member.
- 2.2. The equipment and items are to be used by COTMA members at their own locations in furtherance of activities to restore or maintain their tramcars or to provide infrastructure on which to operate. If parts are not used in a tramcar within the period indicated in an approved application, the COTMA Committee may require them to be returned to the COTMA store.
- 2.3. No parts or infrastructure items are to be sold to other COTMA members, to any other external party nor for scrap. If items are life-expired and suitable only for re-cycling to a scrap dealer, the COTMA Parts Management Group is to be advised and will recommend approval by the COTMA Committee, which will only

- be granted in cases where parts are deemed to be without any further use to any member.
- 2.4. Equipment and items may be swapped between or transferred at no cost to another COTMA member. Any such transfer/swap must be formally documented and documents retained by both parties.
 - 2.5. The equipment or items are not to be used to replace like-for-like parts or infrastructure items (owned by the member museum) that are proposed to be sold, scrapped or disposed of to another party for profit.
 - 2.6. Parts may be used on tramcars to replace life expired parts or inferior parts to allow for improved and uniform maintenance procedures. In general, the receiving museum must refurbish the inferior parts wherever possible and retain them or pass them back to the COTMA managed parts. Removed material may only be disposed of if they have no future operational use by other COTMA members.
 - 2.7. Transfer fees (if any) for tramway parts and equipment held by COTMA to COTMA members will be based on cost recovery of the costs to acquire and store the parts.
 - 2.8. The Committee may decide to spend COTMA funds where necessary to cover the cost of the initial purchase and transport to the COTMA storage facility.
 - 2.9. Applications for parts and equipment are to be addressed to the Parts Management Group and must be accompanied by a justification for the items using the Application Template. Any Victorian Tramway Museum shall have access to parts originally provided by the Victorian Government via VicTrack on the same basis as COTMA members, regardless of whether they are current members of COTMA, subject to approval by COTMA of the strength of their association rules provision for disposal of assets.
 - 2.10. Any dispute between a COTMA Member and the Parts Management Group is to be referred to the COTMA Committee.

3. Pricing

The price allocated to any part or equipment shall be based on the cost of acquisition and storage. Price shall be based on the following items:

- 3.1. Purchase price of the part or equipment (if any)
- 3.2. Handling & transport of part to COTMA storage facility
- 3.3. Any taxes including GST that may be payable by COTMA
- 3.4. Cost of storage
- 3.5. The Parts Management Group will maintain a stock list with documented prices of all parts owned by COTMA, based on the above items. If it is not possible to

establish a price for an individual item, the group will be accountable for setting a price, giving consideration to the principles governing this policy.

4. Handling & Transport

- 4.1. Where handling or transport is required to be arranged by COTMA for parts from Bungaree or St Kilda, the cost incurred by COTMA is to be added to the purchase price.
- 4.2. Member museums may wish to make their own arrangements for handling & transport from Bungaree or St Kilda, in which case COTMA will levy no charge regarding handling & transport.

5. Parts and Equipment Disposal

Should it be necessary for COTMA to dispose of parts that are no longer required by member museums, the following process is to be followed:

- 5.1. Parts Management Group will make a list of parts for disposal.
- 5.2. COTMA Committee will approve the list for disposal and advertise the list to Member museums at no or minimal cost.
- 5.3. Member museums may make offer for parts during limited period (90 days).
- 5.4. Any parts remaining may be disposed of at best price obtainable.
- 5.5. Member museums are responsible for handling & transport costs of any parts acquired through this process.

6. Asbestos

COTMA makes no representation or warranty regarding the presence or absence of asbestos or other hazardous materials in its parts holdings, unless we have formal advice from the donor, in which case we will provide that advice. Member museums are accountable for dealing with any hazardous materials contained in parts and equipment acquired from COTMA.

7. Appendices

Appendix 1: Template for application for parts from the COTMA parts stock.



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Application for parts from COTMA stock

COTMA holds stocks of tram parts as a shared resource for all members. In general, these parts have been gifted to COTMA or purchased at scrap prices.

This template sets out information required from members who apply for parts and is part of the COTMA Tramway Parts and Equipment Policy.

Each section outlines information required. A set of notes explain how that information is used in the assessment of the application. The template is designed to be filled in using Word and sections will expand to accommodate information provided. There is a section at the end where additional comments may be made.

Once completed, the document should be sent to the COTMA secretary, who also acts as secretary to the Parts Management Group. Only the content of this application will be considered in assessing the application. Please be brief but don't assume that the Group knows all about your needs.

1. **What is the name of your Museum / Group and where are you located?**
2. **What tram or trams will the equipment be used in?**
3. **What equipment are you requesting?**
4. **How soon do you expect to start using the equipment and how long do you expect the project to take to complete?**
5. **Is the equipment you are requesting a replacement for existing parts? If so, how will you refurbish the replaced parts for future use?**
6. **Is the equipment to be held in stock for urgent repairs on a tram used in heavy traffic? How often is/are the tram(s) used? How will you refurbish the replaced parts for future use?**

- 7. Is the equipment to be used to make a non-operational tramcar body operational? What issues do you foresee in keeping the tramcar operational into the longer term?**

- 8. Who is the contact person at your museum / group for any queries or discussion related to this application?**

- 9. Are there any other comments you wish to make in support of the application?**

Appendix 2: Notes on template for application for parts.



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**Notes on Template Questions
Application for parts from COTMA stock**

These notes explain how information included in an application for parts from reserves held by COTMA will be used in the assessment of the application.

1. What is the name of your Museum / Group and where are you located?

This is to allow checking of your eligibility for access to the parts and in cases of competing interests may affect ranking of applications as described in clause 1.10

2. What tram or trams will the equipment be used in?

This is to clarify the need for and suitability of the proposed equipment. A conservation plan will be a useful document to support the answers to this and following questions.

3. What equipment are you requesting?

Detailed lists are required here. It is recommended that you consult with the parts group to ascertain what is available and how it is stored. e.g. you may have to take a complete truck to get traction motors.

4. How soon do you expect to start using the equipment and how long do you expect the project to take to complete?

In general, equipment will only be provided when it is likely to be used within 12 months. This is to maintain a central reserve rather than each museum collecting parts to use 'some day'.

5. Is the equipment you are requesting a replacement for existing parts? If so, how will you refurbish the replaced parts for future use?

See clause 2.6 in the policy. These items are the last stock and if we are to continue to operate heritage trams into the future we can't afford to throw away parts.

6. Is the equipment to be held in stock for urgent repairs on a tram used in heavy traffic? How often is/are the tram(s) used? How will you refurbish the replaced parts for future use?

See clause 2.6 and the note above. This question is to enable the group to support supply of critical spares for busy heritage tram operations, while maintaining the long-term availability of these critical parts.

- 7. Is the equipment to be used to make a non-operational tramcar body operational? What issues do you foresee in keeping the tramcar operational into the longer term?**

Museums in some locations have had no chance of collecting trams at end of their operational life. This question should be answered to show that you have a viable plan to make a tram operational in the long term.

- 8. Who is the contact person at your museum / group for any queries or discussion related to this application?**

This person should be familiar with the conservation plan for the tram in question and have the ability to respond to technical questions about tram parts.

- 9. Are there any other comments you wish to make in support of the application?**

This is your opportunity to say the things you want to tell the parts group but don't fit into any of the questions above.