

Tower Hamlets

Health and Wellbeing Board

# Pharmaceutical Needs Assessment Executive Summary 2018



## Executive Summary

It is a statutory requirement for a Pharmaceutical Needs Assessment (PNA) to be developed and published every three years (or earlier where significant changes have occurred) by each area covered by a Health and Wellbeing Board (HWB). The purpose of the PNA is to plan for the commissioning of pharmaceutical services and to support the decision-making process in relation to new applications or change of premises of pharmacies.

This PNA has been undertaken during a time of uncertainty around how pharmacy services will develop over the next three years. The 2016 Murray report reviewed the Pharmacy Contract Revisions 2016 and recommended major changes to the way in which pharmaceutical services should be delivered. Key changes to the Pharmacy Contract include simplifying the NHS pharmacy remuneration system, helping pharmacies to become more efficient and innovative and encouraging longer prescription durations where clinically appropriate. However, at the time of writing, these recommendations have not yet been implemented given they are currently under judicial review. It is complex to predict the impact on residents of such changes before it is understood which services may be reduced, changed or closed.

Since the last Tower Hamlets PNA was published in 2015, no major changes to pharmaceutical provision have been observed, although the resident population of the borough continues to increase. There are 48 community pharmacies in the Tower Hamlets HWB area for a population of 304,854, an average of 15.7 pharmacies per 100,000 population, lower than the England and London averages of 21.3 and 21.4 respectively. All localities have at least one community pharmacy, however the rate varies across the borough with the South East and South West localities having fewer numbers of pharmacies per head of population than in the North.

Overall access is good. In addition, all localities have services available during weekdays and Saturdays, and three of the four localities have services on Sundays.

Demand for community pharmacies may eventually increase due to national policy and population growth. Current national policies highlight the potential of community pharmacy to deliver enhanced community-based healthcare access thereby reducing demand on urgent and primary care services.

A review of the Joint Health and Wellbeing Strategy (JHWS) and Joint Strategic Needs Assessment (JSNA) identified that there may be scope for pharmacies to support more local health needs. The borough continues to experience deprivation with high rates of unemployment with the demography comprising of a young, fast growing, mobile population.

Addressing many of Tower Hamlets' 'areas of opportunity', as identified in the JSNA and JHWS, could include an expanded role for pharmacists. Priority areas identified by are linked to life course and cover:

- Conception, pregnancy and being born
- Growing up – early years
- Growing up – childhood and adolescence
- Being an adult
- Ageing and growing old
- End of life and dying

The JSNA needs to be considered alongside the main strategic plans for Tower Hamlets. Other priorities that pharmacists could play a role in include collaborating with initiatives aimed at reducing domestic violence and supporting enhanced promotion of the following – cancer detection and care, flu vaccination amongst health care workers, improved housing with a focus on vulnerable adults, monitoring of hospital admissions caused by injuries in children, diabetes prevention, living well with people with multiple chronic illness, improved end of life care and monitoring the tipping point into need for health and care services.

Decisions concerning the promotion of pharmacist led services for these programmes will need to be based on more focused health needs assessments and commissioning strategies.

**The pharmacy user and public stakeholder engagement identified that many of them found pharmacy opening times to be good and pharmacy staff friendly. However, there was concern in some quarters about the ability to have confidential discussions.**

## Conclusions

The Tower Hamlets Health and Wellbeing Board (THHWB) has updated the information in relation to pharmacy services in its borough as well as information regarding changes in pharmacy services. In addition, the THHWB has reviewed the current health needs of its population in relation to the number and distribution of the current pharmacies in Tower Hamlets and those pharmacies in neighbouring boroughs adjoining Tower Hamlets.

The PNA is required to clearly state what is considered to constitute necessary services as required by paragraphs 1 and 3 of Schedule 1 to the Pharmaceutical Regulations 2013.

- For the purposes of this PNA, necessary services are defined as essential services.
- The Advanced, Enhanced and Locally Commissioned services are considered relevant services as they contribute towards improvement in provision and access to pharmaceutical services.

When assessing the provision of services in Tower Hamlets, data have been analysed across localities, between population groups and by deprivation. In particular the following have been considered:

- The maps showing the location of pharmacies within Tower Hamlets compared with population density and deprivation
- The number, distribution and opening times of pharmacies within Tower Hamlets
- Pharmacy locations across the border
- Population density in Tower Hamlet and consequent access to pharmacies close by
- The increase in daytime population
- Projected population growth
- The age, gender and ethnicity of the population
- Neighbourhood deprivation in Tower Hamlets
- Location and opening hours of GP practices providing extended opening hours

- Location and opening hours of NHS Dental contractors

**Based on the latest information on the projected changes in the THHWB geographical area over the next three years, alongside the latest information regarding building plans and expected additional population increases during this time, along with the increases in the daytime population, the THHWB has concluded that the current pharmacy services are adequate and have a good geographical spread. Although some measures of the number of pharmacies in the borough show a lower level of provision than elsewhere, the high population density in the borough indicates that no one is very far from a pharmacy.**

**Tower Hamlets HWB has concluded that there are no significant gaps in necessary service provision.**

The detailed conclusions are as follows:

- There is no evidence that there are any significant current gaps in the provision of essential services (necessary services) across the borough.
- There is no substantial evidence that there are any significant current gaps in the provision of advanced services (relevant services) across the borough.
- There is no substantial evidence that there are any significant current gaps in the provision of enhanced services (relevant services) across the borough.
- There is no substantial evidence that there are any significant current gaps in the provision of locally commissioned services, (relevant services) across the borough.
- THHWB recognise that a number of HWBs which border Tower Hamlets contribute toward meeting the pharmaceutical needs of the Tower Hamlets residents and their contribution has been taken into consideration where appropriate.
- There are population increases expected in the borough in the next three years, particularly in the South East, but on current assumptions we believe these can be absorbed by the existing infrastructure of pharmacies, along with general developments in pharmacy services and the provision of services in different ways which will improve the delivery to the public.

The conclusions reached in this report include assessments that have addressed whether additional provision of pharmacies would improve choice. The analysis shows there is a greater choice of independent pharmacies in the Borough compared with both London and nationally. The HWB considered the following: NHSE have recently assessed the need for pharmacies and generally found that nationally services are adequate; where necessary in localities that have fewer pharmacies the pharmacies qualify for the Pharmacy Access Service and compared to other areas of England London Boroughs have greater choice of pharmacy provider.

The conclusions in this report are based significantly on the data available and future assumptions at the time of reporting about how pharmacy services are likely to develop following the Department of Health's Community Pharmacy in 2016/17 and Beyond document and the Murray Report. The situation is fast moving and it will be important to undertake an annual review of the evidence and assumptions to keep these conclusions up to date.

## Key to Services

- **Essential Services** (necessary services) are commissioned by NHS England and are provided by all pharmacy contractors. These are services which every community pharmacy providing NHS pharmaceutical services must provide and is set out in their terms of service – these include the dispensing of medicines, promotion of healthy styles and support for self-care. Distance- selling pharmacy contractors cannot provide essential services face to face at their premises.
- **Advanced Services** are commissioned by NHS England and can be provided by all contractors once accreditation requirements have been met. These services include Medicines Use Reviews (MUR), New Medicines Service (NMS), Appliance Use Reviews (AUR), Stoma Appliance Customisation (SAC), NHS Urgent Medicine Supply Advanced Services (NUMSAS) (relevant services).
- **Enhanced Services** commissioned by NHS England are pharmaceutical services, such as Minor Ailments, services to Care Homes, language access and patient group directions (relevant services).
- **Locally commissioned Services** are commissioned by local authorities, CCGs and NHS England in response to the needs of the local population (relevant services).

Document Details	
Title	Tower Hamlets Health and Wellbeing Board Pharmaceutical Needs Assessment Final Report 2018
Version:	1.0
Date of Issue:	March 2018
Project description:	Report created by the Public Health Action Support Team (PHAST)

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