

Havering Health and Wellbeing Board

# Pharmaceutical Needs Assessment 2018

## Executive Summary



**Havering**  
LONDON BOROUGH

## 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 Havering PNA was published in 2015, no major changes to pharmaceutical provision have been observed and provision is generally good. There are 46 community pharmacies in the Havering HWB area for a population of 249,085, an average of 18.5 pharmacies per 100,000 population. The England and London averages are 21.3 and 21.4 respectively. The number of pharmacies in each locality varies across the borough with the south having a slightly greater number of pharmacies per head of population than the rest of the borough.

Overall access is good. Over 98% of residents are within one mile of a pharmacy, and for 98% of residents, the closest pharmacy is within the borough. There are four 100-hour pharmacies across the borough providing Sunday opening. Demand for community pharmacies is unlikely to 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.

Since the 2015 PNA was published, both the resident population and GP registered population of the borough has increased. Analysis of housing data shows that there are likely to be population increases in parts of the borough, particularly in the Central and South localities, although over the next three years there is unlikely to be a sufficient increase in requirements for pharmacy services to require significant changes.

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 local health needs. The borough has a few areas of deprivation where local pharmacies could be utilised to support their local needs.

Addressing many of Havering's 'areas of opportunity', as identified in the JSNA and JHWS, could include an expanded role for pharmacists. Priority areas identified by Havering's Health and Wellbeing Board (HWB) are as follows in which there are potential roles for pharmacists:

- Primary Prevention
- Working together to identify those at risk and intervene early
- Provide the right health and social care/advice in the right place at the right time
- Quality of services and user experience

Other areas 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; social prescribing; 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.

## Conclusions

The Havering HWB has updated the information in relation to pharmacy services in its borough as well as information regarding changes in pharmacy services. In addition, the HWB has reviewed the current health needs of its population in relation to the number and distribution of the current pharmacies in the borough and those pharmacies in neighbouring boroughs adjoining the borough of Havering.

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 necessary services in Havering, the following have been considered:

- The maps showing the location of pharmacies within Havering and the Index of Multiple Deprivation
- The number, distribution and opening times of pharmacies within Havering
- Pharmacy locations across the border
- Population density in Havering
- The increase in daytime population
- Projected population growth
- The ethnicity of the population
- Neighbourhood deprivation in Havering
- Location and opening hours of GP practices providing extended opening hours
- Location and opening hours of NHS dental contractors
- Results of the public questionnaire
- Proposed new housing developments.

Based on the latest information on the projected changes in population of the HWB area within its geographical area over the next three years, alongside the latest information regarding building plans and expected additional population increases during this time, the HWB has concluded that the current pharmacy services are adequate and have a good geographical spread, particularly covering those areas of higher population density.

The detailed conclusions are as follows (key types of pharmacy services are specifically detailed below).

- No gaps have been identified in **necessary services** (essential services) that if provided either now or over the next three years would secure improvements, or better access, to essential services across the whole borough.
- There is no gap in the provision of **necessary services** (essential services) **during normal working hours** across the whole borough.
- There are no gaps in the provision of **necessary services** (essential services) **outside of normal working hours** across the whole borough.

- There are no gaps in the provision of **advanced services** (relevant services) at present or over the next three years that would secure improvement or better access to advanced services across the whole borough.
- There are no gaps in the provision of **advanced services** across the whole borough.
- No gaps have been identified that if provided either now or in the future would secure improvements, or better access to **enhanced services** (relevant services) across the whole borough.
- There are no gaps in the provision of **enhanced services** across the whole borough.
- There are no gaps in the provision of **locally commissioned services** (relevant services) at present or over the next three years that would secure improvement or better access to **locally commissioned services** across the whole borough.
- There are no gaps in the provision of **locally commissioned services** across the whole borough.

The conclusions reached in this report include assessments that have addressed protected characteristics of groups living in the borough localities in relation to access to pharmacies. The assessments show no evidence of any overall differences between or within the localities in Havering.

Based on the review of building plans and population projections, there may be a need to review the level of pharmacy services in specific places in the borough in the period up to 2021.

Regular reviews of all the above services are recommended in order to establish if in the future whether changes in these services will secure improvement or better access across the whole borough.

The locality structure provides an opportunity, for pharmacies and other primary care providers to work together to deliver advanced and enhanced services that cross geographical areas, and meet the needs of the population.

Whether there is sufficient choice of pharmacy in Havering was reviewed, it was decided there was sufficient choice of pharmacy in Havering for the following reasons: NHSE have assessed the need for pharmacies and generally found there are too many; here necessary pharmacies qualify for the Pharmacy Access Service in Havering and London boroughs have a greater choice of pharmacy provider compared to many other areas in England.

The borough recognises that there may be developments in pharmacy provision that may not mirror the traditional model of a high street pharmacy, for example, online prescriptions or pharmacists working more closely with primary care.

## Key to Services

- **Necessary services** (essential 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** (relevant 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), Flu Vaccination, New Medicines Service (NMS), Appliance Use Reviews (AUR), Stoma Appliance Customisation (SAC), NHS Urgent Medicine Supply Advanced Services (NUMSAS).
- **Enhanced services** (relevant services) commissioned by NHS England are pharmaceutical services, such as Minor Ailments, services to Care Homes, language access and patient group directions.
- **Locally commissioned services** (relevant services) are commissioned by local authorities, CCGs and NHS England in response to the needs of the local population.

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