

**LEICESTER CITY HEALTH AND WELLBEING BOARD
DATE**

Subject:	Pharmaceutical Needs Assessment
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SUMMARY:

Purpose

1. The purpose of this report is to update the Health and Wellbeing Board on the progress of the Pharmaceutical Needs Assessment (PNA).
2. The PNA is a statutory document that is used by NHS England to agree changes to the commissioning of local pharmaceutical services. As such, if NHS England receives a legal challenge to the services they commission based on the PNA, the local authority could also be part of that legal challenge. It is essential that the process that is followed meets the legislation that is set out and that the PNA is a robust document.
3. The purpose of the PNA is to:
 - Identify the pharmaceutical services currently available and assess the need for pharmaceutical services in the future;
 - inform the planning and commissioning of pharmacy services by identifying which services should be commissioned for local people, within available resources, and where these services should be;
 - inform decision making in response to applications made to NHS England by pharmacists and dispensing doctors to provide a new pharmacy. The organisation that will make these decisions is NHS England.
4. The Health and Wellbeing Board has a statutory responsibility to prepare a Pharmaceutical Needs Assessment (PNA) for Leicester City and publish it by 1st October 2022.
5. The PNA has been prepared according to:
 - i. the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013 (amended) which sets out the minimum

information that must be contained within a PNA and outlines the process that must be followed in its development:

<https://www.legislation.gov.uk/uksi/2013/349/contents>

- ii. the Department of Health and Social Care PNA information pack for local authority health and wellbeing boards to support in the developing and updating of PNAs:

<https://www.gov.uk/government/publications/pharmaceutical-needs-assessments-information-pack>

Governance

6. As many of the relationships required for the PNA are Leicester, Leicestershire and Rutland (LLR) wide – involving representation from NHS England, the Leicestershire Pharmaceutical Committee, Local Professional Network for Pharmacists and the Leicester, Leicestershire and Rutland Local Medical Committee - a PNA Reference Group was established. This Reference Group has supported PNA work across the three Health and Wellbeing Boards, identifying any economies of scale that can be delivered through joint work and ensure that there is an effective process for consultation on each of the PNAs for Leicester, Leicestershire and Rutland.
7. The principal resourcing for the development of the Leicester City PNA was provided by the Leicester Public Health Intelligence Team, with information and advice provided through the PNA Reference Group by NHS England, the LPC, CCGs and others.

Consultation

12. To gather additional intelligence for the PNA, two surveys ran throughout the spring:
 - i. Public survey asking service users for their views on the current pharmaceutical provision in their local area
 - ii. Survey for Pharmacies/pharmaceutical professionals to complete to collect information on pharmaceutical services they currently provide or may provide in the future, access facilities and languages spoken at the premises.
13. There was a low response from the professional pharmacy survey – only 19 of 85 Leicester pharmacies completed the survey. This means a gap in knowledge of services directly commissioned by pharmacies and any access facilities or languages spoken at community pharmacies. With support from public health colleagues, a phone round is planned to contact the pharmacies, explain the purpose and encourage completion of the survey. The results will be included in the final PNA.
14. The PNA is also subject to a 60-day statutory consultation period which was opened on 6th July 2022 and will close on 4th September 2022. An

email link to the draft PNA and the consultation questionnaire has been sent to the organisations below as required by Regulation 8 of the Pharmaceutical Services Regulations:

- the Local Pharmaceutical Committee
- the Local Medical Committee
- any persons on the pharmaceutical lists and any dispensing doctors list for its area
- any LPS chemist in its area with whom NHS England has made arrangements for the provision of any local pharmaceutical services
- Healthwatch, and any other patient, consumer or community group in its area which in the view of the Health and Wellbeing Board has an interest in the provision of pharmaceutical services in its area;
- any NHS trust or NHS foundation trust in its area
- NHS England
- any neighbouring HWB.

The consultation can be accessed via this link:

<https://consultations.leicester.gov.uk/public-health/pna-2022>

15. The consultation is also being promoted through internal networks and communications.
16. The results of the 60-day consultation will be collated and included in the final draft of the PNA for review by the Health and Wellbeing board in September 2022 and publication in October 2022.
17. An executive summary of the draft PNA is included in appendix 1

Equality Impact Assessment

18. The PNA will be subject to an EIA. This is currently underway and will use information collected from the pharmacy survey to inform any potential gaps in services or access barriers.

RECOMMENDATIONS:

The Health and Wellbeing Board is requested to:

- to note this progress report;
- to receive the final PNA report for approval in September 2022.

APPENDIX 1

PHARMACEUTICAL NEEDS ASSESSMENT – EXECUTIVE SUMMARY

Purpose

The purpose of the Pharmaceutical Needs Assessment (PNA) is to:

- identify the pharmaceutical services currently available and assess the need for pharmaceutical services in the future
- inform the planning and commissioning of pharmacy services by identifying which services should be commissioned for local people, within available resources, and where these services should be; and
- inform decision making in response to applications made to NHS England and NHS Improvement by pharmacists and dispensing doctors to provide a new pharmacy. The organisation that will make these decisions is NHS England and NHS Improvement.

Content

The PNA has reviewed:

- Demographics of the relevant population shown as a whole and more specifically by locality with clear indication of needs specific to each area.
- Existing pharmacy provision and services (as at March 2022)
- Local area maps locating pharmacies and pharmaceutical services.
- Services available in neighbouring Health and Wellbeing Board areas that could affect the need for services.
- Gaps in the provision of services, taking into account future requirements that could be met by providing more pharmacies or pharmacy services.
- Impact of “The Community Pharmacy Contractual Framework for 2019/20 to 2023/24: supporting delivery for the NHS Long Term Plan” document.

The PNA does not include prison pharmaceutical services or hospital pharmacies.

Description of current services

1.1. Essential Services

- Dispensing
- Repeat Dispensing
- Disposal of Unwanted Medication
- Promotion of Healthy Lifestyles
- Sign Posting
- Support for Self Care
- Clinical Governance

1.2. Advanced Services – these are optional services that are commissioned nationally by NHS England through the core contract

- Medicine Use Review and Prescription Intervention Service (MUR) Activity
- New Medicines Services (NMS)
- Appliance use reviews (AUR)
- Stoma Appliance Customisation Service
- Community Pharmacist Consultation Service (CPCS) Activity
- Hepatitis C Antibody Testing Service Activity
- FLU Vaccinations
- Seasonal Influenza Vaccination Advances Service (FLU) Income
- Discharge Medicine Service Income
- Covid Vaccination Service Activity

1.3. Enhanced Services which are locally commissioned including

- C-Card (condom provision and sexual health advice)
- Emergency Hormonal Contraception (EHC)
- Child influenza vaccination service
- Needle Exchange
- Supervised Consumption
- Palliative Care

1.4. Pharmacies facilities – *to be informed by pharmacy survey*

- Wheelchair access
- Access to disabled car parking within 100m
- Private consultation rooms
- Customer toilets
- IT facilities
- Foreign languages spoken
- Electronic prescription service

1.5. Different types of pharmacy contract

- Internet/distance selling
- 100-hour dispensing
- Dispensing practices
- Dispensing appliance contractors
- Cross-border pharmacies affecting local population

2. Local Health Needs:

Leicester is a city characterised by rich diversity, with a younger population than England and around half of its residents from an ethnic group other than White British at the time of the 2011 census. Additionally, it experiences high levels of deprivation with around 35% of its 354,036 residents living in the 20% most deprived areas in the country. Health needs within the city are not evenly distributed, with the worst outcomes often concentrated in the most deprived areas. Life expectancy for men and women in Leicester is significantly lower than the England average.

Local health needs are also described across 6 locality areas (as used in Leicester City Health and Wellbeing survey) to indicate local variation in the population and health needs.

3. Location and access to pharmacies:

There are 85 pharmacies in Leicester (March 2022), equivalent to 2.4 pharmacies per 10,000 population (2.1 in England). All Leicester pharmacies are open for at least 40 hours per week, and 8 are open for 100 hours. The majority of 100-hour pharmacies are located in the west and central locality areas of Leicester, with one in the north, one in the east and one in the south; opening times are generally from 7am to 11pm Monday to Saturday, with some opening for reduced hours on Sunday.

There are more pharmacies concentrated in the centre and north of the city, and fewer in the east and north west of the city. Travel time analysis indicates that generally nearest pharmacies can be reached within 15 minutes of walking. There are a few areas of the city where walk times may be more than 15 minutes but these should be accessible by car or public transport within 15 minutes. Leicester residents can also make use of several pharmacies just into Leicestershire; 9 pharmacies within 0.5km and 15 between 0.5 and 1km of the city boundary.

4. Pharmaceutical service provision

All pharmacies are required to dispense medicines as part of their essential services contract with NHS England and NHS Improvement. In addition, they may be accredited to provide advanced services or locally commissioned services to provide for the needs of the local population.

Service provision is considered across Leicester by six locality areas. These have been defined by, and are consistent with, those used in the Health and Wellbeing Survey 2018. It is acknowledged that not everyone will choose their nearest pharmacy, however,

by providing rates for smaller locality areas this helps to show variation in provision of services for local populations across the city.

6 Projected future needs

By 2043, the population of Leicester is predicted to grow by around 37,400 to give a total population of around 391,400. Projections indicate that Leicester will have an increase of 18,600 people aged 65 and over, which represents an increase in the proportion of the population aged 65 and over from 12% in 2018 to 16% in 2043.

With the current provision of 85 pharmacies in Leicester, this would offer a rate of 2.2 pharmacies per 10,000 population. Nationally, there are 2.1 pharmacies per 10,000 population based on the number of pharmacies alone; it does not take into account variation in opening hours and services provided.

7 Consultation

There is a statutory requirement for each Health and Wellbeing Board to consult a number of bodies about the contents of the pharmaceutical needs assessment for a minimum of 60 days. The consultation period will take place between 6th July and 4th September 2022. The results will be incorporated into the revised PNA at the completion of the consultation period before submission to the Health and Wellbeing Board for approval.

8 Analysis of gaps in service

Pharmacies and local populations:

As of 31st March 2022, Leicester has 85 pharmacies located across the City, including 9 distance selling pharmacies, one Local Pharmaceutical Service pharmacy and one pharmacy eligible for the Pharmacy Access Scheme.

Overall Leicester has more pharmacies per head of the population than England (2.4 vs 2.1 pharmacies per 10,000 population).

Pharmacies are not evenly distributed throughout the city. There are more pharmacies in the north and centre of the city, with several closely located in Belgrave (around Belgrave Road) and another cluster around Spinney Hills towards Stoneygate. In the west of the city the pharmacies are more widely spread, although there are a number along the Narborough Road area in the West End.

Access and travel times:

Analysis of access and travel times suggests most residents will be able to access their nearest pharmacy within 15 minutes by walking, car or public transport. Travel times by car and public transport will be subject to traffic

variations during the day. Residents may have to travel further to reach a pharmacy outside of normal opening hours.

Opening hours:

All Leicester pharmacies are open for at least 40 hours per week; over half (47) are open up to 50 hours per week and Leicester has 8 pharmacies classified as 100-hour pharmacies. The 100-hour pharmacies are located in the west (3 pharmacies), central (2), east (1), north (1) and south (1) locality areas of the city. There is lower provision for extended opening hours in the north west of Leicester, however there are two 100-hour county pharmacies within 1km of the City border towards the north west of the city.

Essential Services:

It is concluded that there is adequate provision for the population of Leicester since essential services are provided by all pharmacies. Some residents may have further to travel where pharmacies are more sparsely distributed and opening hours are shorter (particularly in the north west of Leicester).

Advanced Services:

The majority of pharmacies provide the advanced services Community Pharmacist Consultation Service, Flu Vaccination Service and New Medicines Services. Few pharmacies offer Stoma Appliance Customisation and no pharmacies offer Appliance Use Reviews or Hepatitis C Testing Service.

Locally Commissioned Services:

Locally Commissioned Services are services commissioned by Local Authorities and Clinical Commissioning Groups (CCGs) which can be tailored towards the health needs of the local population. Pharmacies can be particularly effective in providing services to more hard-to-reach groups as they offer a walk-in service and do not require an appointment. They also offer valuable advice and support for people in making lifestyle choices and in managing their own health conditions.

Where data is available, the PNA presents maps showing the location of pharmacies providing each service by the six locality areas across the city. In order to provide an indication of variation across the city, rates are provided per 10,000 population within the locality area. It is recognised however, that residents will not always choose the pharmacy located nearest to them.

9 Conclusions and recommendations

This PNA has reviewed the provision of pharmaceutical services as of March 2022 (where available, otherwise at March 2021) and concludes that overall provision is

adequate for the population of Leicester. There are differences in local provision of services across the city and it may be that residents in some areas have to travel a little further to access a particular service or out of normal working hours.

The majority of pharmacies are accredited to carry out the advanced services of Community Pharmacist Consultation Service, Flu Vaccination Service and New Medicines Services (NMS).

Community based pharmacies offer a range of locally commissioned services to the local population that can be tailored by commissioners to meet specific local healthcare needs. Pharmacies can provide a valuable service to patients, particularly those more hard-to-reach groups who can take an advantage of a drop-in service at a time more convenient to themselves without the need for an appointment. It may also be more appealing to use a less formal environment within a pharmacy compared with the GP surgery.

Throughout the Covid-19 pandemic, the accessibility and provision of some pharmaceutical services changed. However, it is difficult to predict whether such changes will continue into the future or whether they will revert to pre-pandemic levels within the lifespan of this PNA. Given the potential benefits to patients, it is recommended that pharmacies are encouraged to maintain improved service provision.

Equity of service:

It is recommended that NHS England and NHS Improvement (and where relevant Leicester City Council and Leicester, Leicestershire and Rutland Integrated Care Board) should:

- Keep under review locations and opening times to assess whether access is equitable for all residents.
- Work with pharmacies and Local Pharmaceutical Committee to examine how equity issues can be addressed further
- Review cross-city and county-border service provision to ensure uniformity of access and quality of service
- Work closely with Integrated Care Board and Primary Care Networks to tackle health inequalities and address digital literacy
- Encourage pharmacies to offer discretionary services in relation to local need.

Promotion of health and healthcare management:

It is recommended that NHS England and NHS Improvement (and where relevant Leicester City Council and Leicester, Leicestershire and Rutland Integrated Care Board) should:

- Encourage the implementation of Healthy Living Pharmacy to promote healthier lifestyles through pharmacies so that individuals can gain advice and support in reducing unhealthy behaviours and adopting healthier ones.
- Ensure that the requirement for promotion of healthy lifestyles campaigns through pharmacies (Public Health) is fulfilled
- Consider and encourage the opportunity to include and develop the role of pharmacies in commissioning strategies and through the Integrated Care System - particularly in relation to providing services which deflect work out of primary care general practice.
- Assess levels of uptake of advanced and locally commissioned services and follow-up low or high performers in order to share best practice.
- Keep under review the appropriateness of monitoring and quality visits to pharmacies, in addition to pharmacy self- assessment, in order to provide assurance of effectiveness and to promote service improvement.

Community Pharmacies Policy:

It is recommended that NHS England and NHS Improvement (and where relevant Leicester City Council and Leicester, Leicestershire and Rutland Integrated Care Board) should:

- Review evidence of impact of policy and funding changes on services annually and report any findings to the Health and Wellbeing Board with appropriate advice.