

Committee: Health and Wellbeing Board	Dated: 15 July 2018
Subject: Pharmacy services in the City of London	Public
Report of: Director of Community and Children's Services	For Information
Report author: Sarah Thomas, Health and Wellbeing Executive Support Officer	

Summary

The Health and Wellbeing Board has a statutory obligation to produce a Pharmaceutical Needs Assessment (PNA) at least every three years. The PNA includes information on current pharmaceutical service provision, information on health and other needs, and an assessment on whether current provision meets current and future needs of the area. The PNA will be used by NHS England to commission future pharmacy services in the area and will also inform the commissioning plans of City of London Corporation and City & Hackney CCG.

The PNA does not identify any gaps in current provision of pharmaceutical services in the City of London and does not anticipate any gaps within the next three years.

This report also considers the role of pharmacies in the City of London more broadly, particularly their role in health promotion and provision of health services for both City residents and workers.

Recommendation

Members are asked to:

- Note the report.

Main Report

Background

1. Since 2013, the responsibility for producing the PNA has been a statutory responsibility of the Health and Wellbeing Board (HWB). The HWB must update the PNA at least every 3 years. The previous City of London PNA was produced in 2015.
2. Pharmaceutical Needs Assessments (PNAs) are used by the NHS, Clinical Commissioning Groups (CCGs) and local authorities to commission community pharmacy and related services. NHS England is responsible for making decisions on applications to open new pharmacies and dispensing appliance contractor premises; the PNA document informs these decisions at a local level.

3. An external expert resource, Soar Beyond Limited, was commissioned to support the preparation of the draft PNA 2018 report. The process was managed by a PNA Steering Group, including representatives from the City of London Corporation, City & Hackney CCG, the City & Hackney Local Pharmaceutical Committee, the City & Hackney Local Medical Committee and City of London Healthwatch.
4. The PNA underwent a rigorous consultation process to ensure it accurately reflected local need. Firstly, surveys were undertaken with the public, commissioners and community pharmacy contractors to seek opinions on current pharmaceutical services provided in the City of London. These surveys were carried out and completed in the summer of 2017. Responses were received from 14 community pharmacy contractors, 125 members of the public, and 1 commissioner. A report on the findings of the survey is provided in the PNA. Secondly, the PNA was made available for a 60-day consultation between December 2017 and February 2019, with the results considered by the PNA Steering Group.
5. Responsibility for formally signing-off the current PNA was delegated to the Director of Public Health under a Chairman's action in July 2017. The PNA was published in April 2018 and can be viewed via the following link:
<https://www.cityoflondon.gov.uk/services/health-and-wellbeing/Documents/pharmaceutical-needs-assessment-2018.pdf>

Current Position

6. The PNA includes information on current pharmaceutical service provision, information on health needs and an assessment on whether current provision meets current and future needs of the area. To prepare the report, data is gathered from pharmacy contractors, pharmacy users, local residents, commissioners and planners, among others. The report also includes a range of maps that are produced from data collected as part of the PNA process.
7. The PNA concludes that there are no gaps in current provision of pharmaceutical services in the City of London and no gaps are anticipated within the next three years. Key findings include:
 - The City of London has 16 community pharmacies (as of 9 February 2018), the same number as the 2015 PNA, for a resident population of around 7,553. The number of community pharmacies per 100,000 resident population for the City is currently 211.8. This is high when compared with the London (21.7) and England (21.5) averages, however when we consider the workday population, estimated to be c. 360,000, then the number of pharmacies per 100,000 population reduces to 4.4. The majority pharmacies in the City of London are open on weekday evenings (after 6pm), seven are open on Saturdays and three on Sundays. The geographic spread of pharmacies and opening hours mean that access is good.

- There is a much higher than average ratio of multiple providers to independents, with 14 community pharmacies owned by Boots UK Ltd, one independent community pharmacy and one distance selling-pharmacy.
 - All pharmacies in the City of London provide “essential services”, including dispensing medicines, repeat dispensing, dispensing appliances, disposal of unwanted medicines and signposting/advice.
 - The “enhanced services” commissioned by NHS England from pharmacies in the City of London are only provided from one community pharmacy, but provision is considered sufficient as this is the area which has the highest population density, and analysis has also identified a number of pharmacies in the neighbouring boroughs of Islington and Tower Hamlets that provide these pharmaceutical services to City of London residents. These services are the Minor Ailments Service and Medicines Optimisation Service.
 - There are a number of “advanced services” currently commissioned by NHS England from pharmacies in the City of London:
 - Medicines Use Reviews, available at all community pharmacies.
 - New Medicine Service, available at all community pharmacies.
 - NHS Urgent Medicine Supply Advanced Service at one pharmacy.
 - All community pharmacies offer the flu vaccination to those eligible.
 - The City of London Corporation commissions further services through pharmacies:
 - Smoking cessation services at all community pharmacies.
 - Needle exchange at one community pharmacy.
 - Supervised consumption for substance misuse at two community pharmacies.
 - Sexual Health services (condom distribution and signposting to other services) at two community pharmacies. Full sexual health services are commissioned separately.
 - Healthy Start vitamins at two community pharmacies.
8. One key barrier to providing health services through pharmacies is the matter of who pays. For most pharmacy commissioned services, the local authority must commission them on a per item basis. There is no cross-charging mechanism for recouping costs from residents from other boroughs. This means that the City of London is limited in what it can provide directly, as our public health budget is limited and cannot be used to extensively subsidise other boroughs’ residents.
9. Additionally, the pharmacies in the City of London provide a number of private services for which there is high demand from City workers. These include travel vaccinations and other private vaccinations (e.g. flu, pneumonia, meningitis B, HPV and chicken pox).
10. Boots in Liverpool Street Station has historically allowed the local sexual health provider from St Bart’s Hospital to use one of their consulting rooms to see patients who couldn’t get to the clinic. Because sexual health costs can be cross-charged between different local authorities, this arrangement has historically worked well to meet the needs of City workers. The new sexual health provider, Homerton Hospital, is exploring whether this service will still be needed, or could be relocated to a different Boots branch, given the close proximity of the new sexual health clinic at 80 Leadenhall to Liverpool Street.

11. There is some concern over the lack of independent pharmacies in the City of London, with the one independent community pharmacy providing several additional services. Financial pressure on pharmacies is increasing, along with some reductions in government funding. Although the other pharmacies in the City could be commissioned to provide these additional services, local residents are keen for the independent pharmacy to be supported.
12. The PNA focuses on the needs of residents and does not cover City workers' needs in detail. From our previous research 'The Public Health and Primary Healthcare Needs of City Workers' in 2012, we know that pharmacies can play an important role in addressing the health needs of City workers. This research highlighted demand for access to health services during early mornings, lunchtimes and evenings, easily accessible from the workplace or located close to transport hubs. These workers may find it difficult to access health services where they live due to their working hours and pharmacy services can help to plug this gap. For instance, over three-quarters of the participants in the research thought it that it would be helpful for pharmacies in the City of London to provide services such as help with stress, anxiety or depression, reducing smoking, healthy eating and weight reduction, problem drinking or drug misuse and sexual health services.
13. The independent pharmacist and several branches of Boots in the City of London have achieved Healthy Living Pharmacy status, which is awarded to community pharmacies that are delivering a broad range of high quality services to meet local need, improve the health and wellbeing of the local population and help to reduce health inequalities. This should ensure that health promotion messages are delivered through pharmacies.
14. The pharmacists' perspective is that they potentially have a very constructive role in supporting NHS primary care services for City workers from their pharmacies. Some City pharmacies have private consultation rooms to ensure confidentiality. They are aware that City workers often work long hours and travel abroad a lot on business, making it difficult to access regular medication. They are also aware that while higher paid City workers may have access to private health insurance and private GP services, lower paid City workers are poorly cared for and struggle to access health services.

Proposals

15. The Public Health team will continue to monitor the provision of pharmacy services in the City of London, including the range and type of services provided, and maintain relationships with all community pharmacies (including the independent pharmacist, any pharmacies in neighbouring areas frequently used by residents and the network of Boots pharmacies). Any significant changes will be brought to the HWB for discussion.
16. Although the PNA concludes that pharmacy provision in the City of London is sufficient to meet the health needs of residents, we also know that City workers heavily rely on pharmacies for accessing health advice and services. We are

currently looking at commissioning further research into the health needs of City workers and will ensure that this considers the role of pharmacies alongside other health services. This proposal will be brought to the HWB for consideration.

Corporate & Strategic Implications

17. HWBs have a statutory duty to produce a PNA at least every three years. The process was overseen by a joint City and Hackney PNA Steering Group to ensure a robust and efficient process. It included data from the Joint Strategic Needs Assessment (JSNA) and was guided by the City of London Joint Health and Wellbeing Strategy (JHWS), supporting its vision of 'working in partnership to achieve longer, happier, healthier lives in the City of London'. The role of pharmacies in meeting the health needs of the local population particularly supports the priority 'promoting healthy behaviours'.
18. The PNA also links into the City of London Corporate Plan 2018-23 and its aim of 'creating a flourishing society'. The PNA particularly contributes to the following aims:
- People enjoy good health and wellbeing.
 - Communities are cohesive and have the facilities they need.

Conclusion

19. The PNA concludes that there are no gaps in current provision of pharmacy services in the City of London and does not anticipate any gaps within the next three years.
20. Pharmacies play an important role in meeting the health needs of both City residents and workers. Future research into the health needs of City workers should consider how pharmacies can provide health services in more detail.

Appendices

- None

Background Papers

City of London Pharmaceutical Needs Assessment, published April 2018:
<https://www.cityoflondon.gov.uk/services/health-and-wellbeing/Documents/pharmaceutical-needs-assessment-2018.pdf>

Sarah Thomas

Health and Wellbeing Executive Support Officer

T: 020 7332 3223

E: sarah.thomas@cityoflondon.gov.uk