

Health and Wellbeing Board

Pharmaceutical Needs Assessment (PNA) Update

7 July 2021

Recommendation(s)

1. The Board notes and comments upon the production of the Pharmaceutical Needs Assessment (PNA) Supplementary Statement for Coventry and Warwickshire
2. The Board notes and comments upon the proposals for the full PNA in partnership with Coventry City Council; noting the potential impact of the COVID-19 response on timescales.

1. Executive Summary

- 1.1 This report provides an update on the PNA in Warwickshire. The Health and Wellbeing Board has a legal responsibility to maintain an up to date statement around the needs for services from community pharmacies. The purpose of the PNA is to assess local needs for pharmacy provision, to identify any gaps in service or unmet needs, and to highlight any services that community pharmacies could provide to address these needs.
- 1.2 The [last PNA](#) was published in March 2018 and was due for refresh by March 2021. However, in light of the COVID-19 pandemic and subsequent pressure on resources NHS England has extended the deadline for publication of the PNA to October 2022.
- 1.3 In the interim, a supplementary statement has been prepared and submitted to NHS England to provide an update on current service provision and review findings from the 2018 assessment. This statement can be found in Appendix 1.
- 1.4 The last PNA concluded that the number and distribution of the current pharmaceutical service provision in Warwickshire was sufficient but it highlighted that an estimated 13,600 houses were due to be built in Warwickshire between 2018 and 2021. In areas of significant housing development and population growth, additional future pharmacy provision will need to be considered.
- 1.5 To maximise the resources available and to align with local planning footprints, it is proposed to work with Coventry City Council on the upcoming PNA, as previously. This aligns with the Coventry and Warwickshire Concordat where both Health and Wellbeing Boards have agreed to work together on areas that will improve outcomes for the public. The key

milestones for the proposed consultation and production of the new PNA are outlined below (Table 1):

Drafting surveys/initial consultation	September / October 2021
Initial public survey	November 2021 – January 2022
Pharmacy survey	November / December 2021
Mapping of needs	January / February 2021
Write PNA document	February - March 2021
Formal consultation	16th April to 18th June 2021
Drafting final document and recommendations	June / July 2022
Final draft to JSNA Strategic Group for sign off	July 2022
Final document submitted to Health and Wellbeing Board	September 2022
Document live	1st October 2022

Table 1: Proposed Process for Production of the Coventry and Warwickshire PNA

- 1.6 The timescales highlighted in Table 1 may be subject to change if there are further impacts of COVID-19.
- 1.7 The process will be led by the Directors of Public Health and their teams from both Warwickshire and Coventry, with a small steering group in place.

2. Financial Implications

- 2.1 It is currently anticipated that any costs incurred as a result of taking the recommended actions will be managed within operational budgets, working together with Coventry City Council to maximise the resources available.

3. Environmental Implications

- 3.1 None

4. Timescales associated with the decision and next steps

The timescales for the proposed process are outlined in Table 1. An update will be brought to a future Health and Wellbeing Board meeting with a final draft for approval in July 2022.

Appendices

- 1. Appendix 1 – Coventry and Warwickshire Pharmaceutical Needs Assessment Supplementary Statement 2021

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The report was circulated to the following members prior to publication:

Local Member(s): Councillors Drew, Golby, Holland and Rolfe

Coventry and Warwickshire Pharmaceutical Needs Assessment: Supplementary Statement – April 2021

PHARMACEUTICAL NEEDS ASSESSMENT SUPPLEMENTARY STATEMENT

This supplementary statement:

- has been prepared by the Public Health teams at Coventry City Council and Warwickshire County Council, in collaboration with the Community Pharmacy Steering Group (CPSG) on behalf of the Coventry and Warwickshire Health and Wellbeing Boards;
- is issued in accordance with Part 2; (6) 3 of the National Health Service (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013¹;
- provides updates to the PNA published in March 2018²
- provides information which supersedes some of the original PNA information, so should be read in conjunction with the original PNA
- relates to changes in population and pharmacy provision between the end of data collection for the 2018 PNA to November 2020.
- Summarises the impacts of COVID 19 on community pharmacy to date

¹ <http://www.legislation.gov.uk/ukxi/2013/349/regulation/6/made>

² https://www.coventry.gov.uk/info/175/data_and_reports/3161/pharmaceutical_needs_assessment_pna/ / <https://www.warwickshire.gov.uk/directory-record/2165/pharmaceutical-needs-assessment-2018->

Summary

This Supplementary Statement takes into account the supply of and demand for Community Pharmacy Services in Coventry and Warwickshire as at January 2021. The data included in this was collated up to December 2020. Analysis of change in population and changes in community pharmacy provision leads to the conclusion that there have not been sufficient changes to require new community pharmacy services at this time.

Background

The Pharmaceutical Needs Assessment 2018 (2018 PNA) identified no additional needs for the provision of pharmaceutical services. This supplementary statement serves as an update on current service provision and review of findings of the 2018 PNA. A full PNA revision is expected to be published prior to the 1st October 2022, as required by the regulations.

Population

Assessment of the latest population projections have not identified any major changes to demography or infrastructure that will impact on pharmaceutical service need as set out in the 2018 PNA and which would be relevant to the granting of control of entry applications.

Since 2016, the estimated population of Coventry has increased by 5%, from 352,900 in mid-2016 to 371,520 in mid-2019. The population of Warwickshire has seen a smaller increase of 3%, from 558,910 in mid-2016 to 577,930 in mid-2019.ⁱ

Housing

We have also considered the potential impact of large housing developments on the need for community pharmacy. Between 2016 and 2019, the number of dwellings in Coventry has risen by 3%, totaling 142,100. The number of dwellings in Warwickshire has risen by 5%, totaling 259,300.

Demand for new housing in Coventry and Warwickshire remains high and this will need to be accounted for in the planning of community pharmaceutical services to match new house building in future. Changes to national guidance on development announced in December 2020 will need to be taken into account in the next full Pharmaceutical Needs Assessment.

Service Provision

The changes which have taken place in the service provision since the 2018 PNA, i.e. between April 2018 to end November 2020, are summarised in the table below. Full details of these changes are included in Appendix 2.

Changes to Contracts, April 2018 – November 2020

Coventry

Type of Change	Description of Change
New Pharmacy Contracts	3 new contracts - distance selling only
Pharmacy Closures	2 Distance selling, 2 '100 hours' contracts and 3 standard contracts
Consolidations	1 standard contract

Warwickshire

Type of Change	Description of Change
New Pharmacy Contracts	2 new contracts – community pharmacies
Pharmacy Closures	1 Distance selling and 3 standard contracts
Consolidations	2 standard contracts

In Coventry at the time of the 2018 PNA there were 91 community pharmacies, of which 10 were 100 hours. There were also 6 internet/distance selling pharmacies. As of November 2020, there are 85 community pharmacies, of which 8 are 100 hours, and 7 internet/distance selling pharmacies.

In Warwickshire at the time of the PNA there were 105 community pharmacies, of which 9 were 100 hours. There were an additional 6 internet/distance selling pharmacies. As of November 2020, there are 102 community pharmacies, of which 9 are 100 hours, and 5 internet/distance selling pharmacies.

Consolidations

The Coventry and Warwickshire Community Pharmacy Steering Group has considered several consolidations of provision since 2018 and believe that these have not led to any diminution of service provision as a result.

On 5 December 2016, [amendments](#) to the 2013 Regulations come into force which facilitate pharmacy business consolidations from two sites on to a single existing site. Importantly, a new pharmacy would be prevented from stepping in straight away if a chain closes a branch or two pharmacy businesses merge and one closes. This would protect two pharmacies that choose to consolidate on a single existing site – where this does not create a gap in provision.

Pharmacy opening hours

In addition to the material changes above there have also been some changes in

supplementary opening hours which are not covered within this statement. As the picture is fast changing the most up to date opening hours for each pharmacy can be found on the [nhs.uk](https://www.nhs.uk) website.

Tightening Financial Circumstances for Community Pharmacies

The Coventry and Warwickshire Community Pharmacy Steering Group has noted the impact of tightening contractual and business conditions on the provision of community pharmaceutical services and recommends that this is considered in the next full Pharmaceutical Needs Assessment

Effects of Covid-19

Community Pharmacy Services have been under huge pressure throughout the pandemic, dealing with more requests for prescriptions, advice and support along with adapting to COVID secure working including social distancing and have faced business continuity challenges as a result of staff sickness or isolation requirements. A large number of pharmacy staff are from the BAME community and / or have other risk factors for Covid19 - meaning that additional precautions have been necessary and at times reducing the number of staff available to work in the pharmacy. Some services had to be prioritised over others and for a period consultation rooms were not in use until PPE was more readily available.

Pharmacies also provided more support over the phone and in some cases via video consultations. Some services were adapted in conjunction with Commissioners to support clients and pharmacies in managing risk. They did not however, close their doors except during a short period when allowed under the flexible working regulations. This was automatically allowed for up to 2.5 hours a day in the first national lockdown and following approval for some pharmacies in difficulty during the second national lockdown. Pharmacies were for the first time funded to provide or facilitate deliveries for the shielded group but only during parts of the national lockdown. Pharmacies were also supported by local council teams and volunteers to support patients with medicine deliveries.

Many people have praised the way Community Pharmacies have stood up to the pressure and supported their patients, through a variety of means including face to face throughout. More information is included in Appendix 2. Some examples are also available on the Pharmaceutical Services Negotiating Committee (PSNC) website. [COVID-19 Hub : PSNC Main site.](#)

National changes:

On 20th October 2020 [new NHS regulations were laid](#) to introduce changes to the Terms of Service for pharmacy contractors.

Some of these changes relate to the coronavirus pandemic, but most are changes which were previously agreed as part of the [5-year Community Pharmacy Contractual Framework \(CPCF\)](#) and were originally planned to be introduced in July 2020.

Key changes are that all pharmacies will be Healthy Living Pharmacies, all will be required to keep NHS website and DoS up to date and use SCR as and when

appropriate. More details are included in Appendix 2 and available on PSNC website.

Conclusion:

There have not been sufficient changes to the local population, taking into account population projections, large housing developments and rate of pharmacists per 10,000, to create a need for a new community pharmacy. The changes to the local service provision, taking into account closure of pharmacies and change in hours, are not sufficient to create the need for a new community pharmacy. Therefore, we conclude there are no gaps in access to pharmaceutical services in Coventry/Warwickshire.

Pharmacy provision will be reviewed next through the 2022 Pharmaceutical Needs Assessment, expected to be published by October 2022.

ⁱ Source: ONS mid-year population estimates