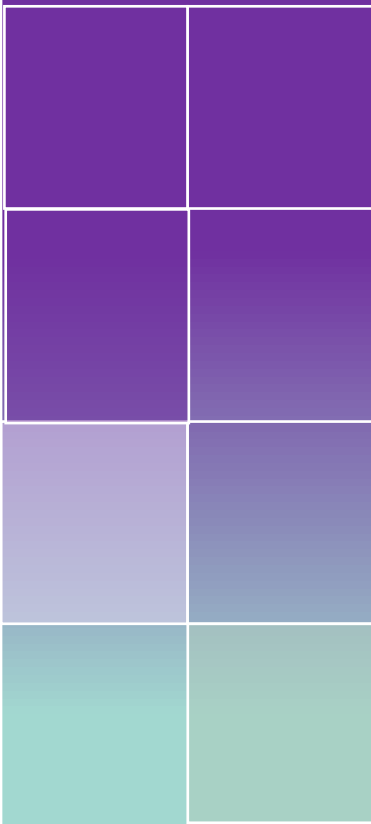


2018



West Sussex Pharmaceutical Needs Assessment (PNA)

Executive Summary



Health and Wellbeing Board

Acknowledgements

PNA Steering group members	
Name	Organisation
Jacqueline Clay	Principal Manager, Public Health and Social Research Unit - WSCC (Chair)
Aloisia Katsande	Public Health Evidence Review Specialist -WSCC (Project lead)
Ryan Walkley	JSNA Data and Information Officer - WSCC
Fiona McGonigle	External Consultant Public Health and Pharmacy - WSCC
Clare D. Toon	JSNA Project Officer - WSCC
Mike Hedley	Contracts Manager (Pharmacy and Optometry) - NHS England
Amanda Marshall	Contracts Officer - NHS England
David Clark	Chairman - West Sussex LPC
Martin Mandelbaum	Chief Executive Officer - West Sussex LPC
Dr Simon Pett	GP - West Sussex LMC
Jo Tuck	Community and Involvement Lead - Healthwatch
Sue Carter	Head of Medicines Management - NHS Coastal West Sussex CCG
Jay Voralia	Head of Medicines Management - NHS Crawley CCG and NHS Horsham and Mid Sussex CCG

WSCC Operational Project Team	
Jacqueline Clay	Principal Manager, Public Health and Social Research Unit (SG chair)
Aloisia Katsande	Evidence Review Specialist (Lead author)
Fiona McGonigle	External Consultant Public Health and Pharmacy (Lead author)
Ryan Walkley	JSNA Data and Information Officer (Co-author)
Clare D. Toon	JSNA Project Officer

West Sussex Health and Wellbeing Board would also like to acknowledge the contribution of several individuals from the following organisations and departments in the development of the PNA:

- WSCC Public Health Commissioners
- WSCC Strategic Development Department
- WSCC Communications Team
- WSCC Public Health and Social Research Unit
- NHS England
- Members of the public and pharmaceutical service providers who took part in the surveys and consultation
- West Sussex Wellbeing Hubs

Contents

Contents	2
Glossary	3
1. Executive summary	4
1.1 The PNA process	4
1.2 Localities	4
1.3 Key findings	5
1.3.1 Population demographics and health profile	5
1.3.2 Current NHS pharmaceutical service provision and access.....	5
1.3.3 Survey responses regarding access to services	6
1.3.4 Addressing health and wellbeing needs through community pharmacies	6
1.4 Overall conclusion.....	6
1.5 Recommendations.....	7
1.1 Geographical location of pharmaceutical service providers in and near West Sussex	8

Glossary

A&E	Accident and Emergency
AUR	Appliance Use Review
BAME	Black Asian and Minority Ethnic
CVD	Cardiovascular Disease
CCG	Clinical Commissioning Group
CPCF	Community Pharmacy Contractual Framework
DAC	Dispensing Appliance Contractor
DoH	Department of Health
DRUM	Dispensing Review of the Use of Medicines
EHC	Emergency Hormonal Contraception
GP	General Practitioner
HLP	Healthy Living Pharmacy
HWB	Health and Wellbeing Board
IMD	Index of Multiple Deprivation
JSNA	Joint Strategic Needs Assessment
LA	Local Authority
LPS	Local Pharmaceutical Services
LPC	Local Pharmaceutical Committee
LMC	Local Medical Committee
LTC	Long Term Condition
LSOA	Lower Super Output Area
MAR	Medicines Administration Record
MUR	Medicines Use Review
MYE	Mid-Year (population) Estimate
NICE	National Institute of Health Care Excellence
NHS	National Health Service
NMS	New Medicines Service
NUMSAS	New Urgent Medicines Supply Advanced Service
NRT	Nicotine Replacement Therapy
NSP	Needle and Syringe Programme
ONS	Office for National Statistics
OOH	Out of Hours
OST	Opiate Substitution Treatment
PCT	Primary Care Trust
PGD	Patient Group Direction
PHE	Public Health England
PNA	Pharmaceutical Needs Assessment
PSNC	Pharmaceutical Services Negotiating Committee
SAC	Stoma Appliance Customisation
SHAPE	Strategic Health Assessment Planning & Evaluation
STP	Sustainable Transformation Partnerships
WSSC	West Sussex County Council

1. Executive summary

Following the restructuring of the National Health Service (NHS) in April 2013, the responsibility of producing and keeping up to date a Pharmaceutical Needs Assessment (PNA) was transferred to Health and Wellbeing Boards (HWB). The West Sussex HWB produced its first PNA in February 2015 and this PNA is a review of, and replaces the 2015 PNA.

The PNA is a statement of needs for pharmaceutical service provision within the HWB area. It is used by NHS England in its determination as to whether to approve applications to join the pharmaceutical lists or dispensing doctor list under the NHS (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013, as well as applications to change existing services. It is also used by NHS England, Local Authorities (LA) and Clinical Commissioning Groups (CCGs) to inform their commissioning of services from community pharmacies.

1.1 The PNA process

The West Sussex PNA was undertaken in accordance with the requirements set out in regulations 3-9 and Schedule 1 of the NHS (Pharmaceutical Services and Local Pharmaceutical Services) Regulations 2013.

In undertaking this assessment, a PNA Steering Group was formed to oversee the PNA development process and ensure that the PNA meets the statutory requirements. Membership of the group included a wide range of stakeholders: officers from West Sussex County Council (WSCC), and representatives from Local Pharmaceutical Committee (LPC), Local Medical Committee (LMC), West Sussex CCGs, Healthwatch and NHS England.

Surveys were conducted with the public and with pharmaceutical service providers to obtain views on current provision and future need of pharmaceutical services. Although the survey sample was not representative, and no statistical inference was made, it provided a snapshot of views and service provision across West Sussex as reported by respondents. The findings from the surveys were used, in conjunction with other data sources, to inform the PNA. In addition, the consultation, which ran from 1st September until 5th November, was undertaken to obtain feedback on the draft PNA. This was also used to inform the final PNA.

This PNA has drawn on several sources of information to give an overview of the health and pharmaceutical profile and needs of the local population. In particular, the West Sussex PNA draws on the Joint Strategic Needs Assessment (JSNA).

1.2 Localities

For the purpose of the PNA, localities have been defined as the local authority district and borough localities. In some cases, these are broken down to ward level. This was the same approach taken in the previous PNA, in 2015.

1.3 Key findings

1.3.1 Population demographics and health profile

- The average life expectancy at birth in West Sussex is 80.5 years for males and 83.8 years for females.
- Worthing has the lowest average life expectancy for both males and females (78.8 and 82.9 respectively) while Mid Sussex and Chichester have the highest male and female life expectancies respectively (81.9 and 84.6).
- There was an estimated 0.9% (7,510 people) increase in the population of West Sussex in 2016 compared to the previous year.
- West Sussex is less ethnically diverse, with only 6.2% of the population belonging to BAME groups, compared with 20.2% in England. Crawley is the most ethnically diverse locality with 27.9% of the population belonging to BAME groups.
- West Sussex remains one of the least deprived areas in the country, ranking 131st of 152 upper tier authorities (1 being most deprived, 152 being least deprived).
- Of the West Sussex districts and boroughs, Adur remained the most deprived, followed by Crawley, Arun and Worthing.
- An increasing number of people in West Sussex are living longer with disabilities, learning difficulties and limiting long term illness.

1.3.2 Current NHS pharmaceutical service provision and access

- There are 160 community pharmacies in West Sussex; 12 dispensing doctors; 5 appliance contractors and 3 distance selling pharmacies.
- Since the last PNA in 2015, there has been a reduction of 2 community pharmacies and one dispensing doctor. There have been no changes in the number of dispensing appliance contractors and an increase of 2 distance selling pharmacies.
- The number of community pharmacies and dispensing doctors in West Sussex localities ranges from 19 to 22 per 100,000 population, with a West Sussex average of 20 dispensing sites per 100,000 population.
- Nearly half of the community pharmacies in West Sussex open before 9am and 36 open in the evenings after 6.30pm, 17 of which are open beyond 8pm.
- Community pharmacies are spread across the county, with the larger towns in each district having at least one community pharmacy open after 6.30pm.
- Majority of community pharmacies in West Sussex (93%) are open during the day on Saturdays.
- The majority of community pharmacies in larger towns in West Sussex are open on Sundays; however, in most of the smaller towns and villages they are closed.
- Only one pharmacy at Gatwick is open after 5pm on Sundays, due to Sunday trading laws.
- West Sussex has a good coverage of essential services.
- On average, West Sussex has a higher number of pharmacies and appliance contractors providing advanced services, when compared to the Kent, Surrey and Sussex area, the South Region and England.

- There is a good provision of Medicine Use Reviews (MURs), New Medicine Services (NMS) and Seasonal Influenza (flu) vaccination service in West Sussex (95.1%, 85.9% and 65%) by pharmacies.
- The coverage of Stoma Appliance Customisation (SAC) service and Appliance Use Review (AUR) is less extensive (22.0% and 3.0%) respectively, although this is higher than Kent, Surrey and Sussex area, the South Region and England.
- There is a wide range of locally commissioned services provided by community pharmacies and other public health providers that are spread across the County giving patient's choice and accessibility.

1.3.3 Survey responses regarding access to services

- Eighty percent of survey respondents strongly agreed or agreed that they could usually find an open pharmacy when needed.
- The majority of respondents (90%) strongly agreed or agreed that they found it easy to find a pharmacy near where they wanted.
- The majority of people in West Sussex are within 20 minutes travelling time to a pharmacy.
- Ninety-five percent of respondents reported that they travel less than 6 miles to their nearest pharmacy.

1.3.4 Addressing health and wellbeing needs through community pharmacies

- Community pharmacies are a key public health resource.
- There is need for local commissioning organisations to consider and engage with community pharmacies as potential providers of local public health services, particularly when considering unmet health and wellbeing needs of the local population.
- Through their provision of essential, advanced and enhanced services as well as other commissioned and non-commissioned services, community pharmacies contribute towards meeting local priorities.
- The accessibility of community pharmacies provides them with an opportunity to reach a wide range of people and contribute towards reducing health inequalities.
- There is a need to integrate community pharmacy in local strategic commissioning plans. This can be achieved through addressing barriers to service provision and service uptake, and taking into consideration new models of care.
- Healthy Living Pharmacy model is one of the key models for delivering public health services in community pharmacies.

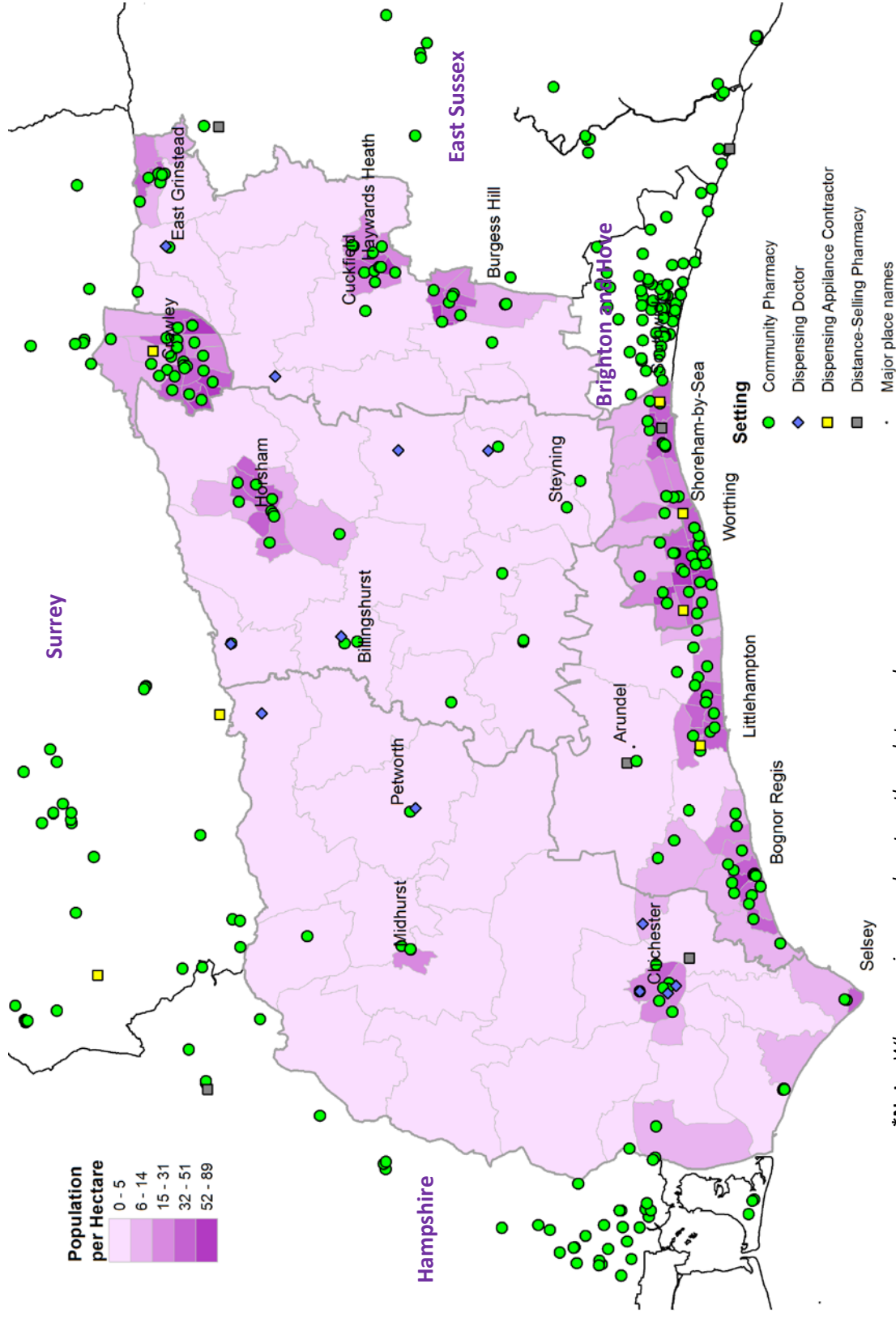
1.4 Overall conclusion

- The PNA has not identified any gaps in service provision of necessary services within the West Sussex HWB area. The current coverage is adequate to provide the necessary services such as essential/dispensing services and advanced services.

1.5 Recommendations

- Overall, the provision of advanced services across the West Sussex localities is good; however, there is some scope for improvement within the current network of providers to maximise patient choice and access.
- In order to maximise the opportunities in the new community pharmacy contract, all community pharmacies should be supported and encouraged to participate in the Quality Payment scheme and the NHS Urgent Medication Supply Advanced Service (NUMSAS).
- Where service uptake or engagement for public health commissioned services is lower in community pharmacies e.g. Health Checks and Smoking Cessation, joint working with commissioners is recommended to identify barriers and potential solutions.
- Ongoing monitoring of the risks of non-funded community pharmacy services such as the medicines delivery service, in response to the reduction in funding associated with the CPCF 2016-18, is required.
- Ongoing monitoring of the risks of closure of community pharmacy contractors across West Sussex is required as a consequence of the reduction in funding associated with the CPCF 2016-18.
- Overall, the current opening hours are good; however, to enhance patient access and choice, some areas may benefit from Sunday opening hours. This is within the scope of existing network of pharmacies and contractual framework.
- There is strong evidence indicating that community pharmacies contribute towards addressing local health and wellbeing priorities. Commissioners need to ensure that community pharmacies are part of local strategic plans, such as STPs. A review of existing commissioning arrangements may be required to support this.
- Minor ailments service is currently not commissioned in West Sussex, therefore commissioners, both local and national, should work with pharmacy teams to consider commissioning this service and include it in local care pathways where possible.
- To support the local priorities, all community pharmacies should be encouraged to implement Level 1 Healthy Living Pharmacy, provide Level 2 Safeguarding training and have staff trained as 'Dementia Friends' as part of the Quality Assessment scheme.
- Taking into account the housing projections, the current population demographics, and the distribution of pharmaceutical service providers across West Sussex, it is anticipated that the current pharmaceutical providers will be sufficient to meet the local needs. However, where housing developments are completed and occupied within the PNA lifetime further consideration may be required, especially in the Rusper and Colgate ward in Horsham.
- It is acknowledged that some Districts and Boroughs are currently, as of January 2018, updating their Local Plans. This means that the number of housing developments and projections may change. To ensure that up-to-date information is available to inform decisions on pharmaceutical services, it is recommended that data relating to housing developments are refreshed annually and published on the West Sussex JSNA website.

1.1 Geographical location of pharmaceutical service providers in and near West Sussex



***Note:** Where services are close together, dots overlap