

SUNDERLAND PHARMACEUTICAL NEEDS ASSESSMENT (PNA)

**REPORT OF THE EXECUTIVE DIRECTOR OF PUBLIC HEALTH AND
INTEGRATED COMMISSIONING**

1. Purpose of the Report

1.1 The purpose of this report is to:

- Raise awareness with the Health and Wellbeing Scrutiny Committee of the work that has been undertaken on behalf of the Health and Wellbeing Board to produce an updated and approved pharmaceutical needs assessment (PNA) for Sunderland for publication by 1st October 2022;
- Provide an update on the work that has been undertaken by the PNA Steering Group to produce an updated PNA for Sunderland in line with this statutory duty;
- provide information about the required statutory consultation which is planned to begin in late March and finish in late May 2022; and
- Raise awareness of the opportunity for members of the Health and Wellbeing Scrutiny Committee to comment on the draft statement of pharmaceutical needs assessment during the consultation period.

2. Statutory Role

2.1 The duty to carry out PNA transferred to Health and Wellbeing Boards under the Health and Social Care Act 2012; this duty came into effect on 1st April 2013. The process is guided by the NHS (Pharmaceutical and Local Pharmaceutical Services) Regulations 2013 and any subsequent updates or amendments.

2.2 The Board published its first PNA on 1st April 2015, having approved it on 20th March 2015. The current PNA was published in Sunderland on 1st April 2018. PNAs must be completely reviewed at least every three years and this was therefore due to be renewed and published no later than 1st April 2021. However, the Department of Health and Social care (DHSC) announced on 21st May 2020 that publication of PNAs would be delayed from April 2021 until April 2022 due to the COVID-19 pandemic. As the pandemic continued throughout 2022, a further 6-month extension was then granted by DHSC to 1st October 2022.

2.3 The Board is required to produce the PNA as part of its broader responsibility for developing a shared understanding of the current and potential future health needs of the population of Sunderland. The PNA is an integral part of the JSNA and is aligned to the Joint Health and Wellbeing Strategy (in Sunderland this being the Healthy City Plan).

3. PNA Process

- 3.1 In line with DHSC guidance on PNAs¹ the work to produce the PNA has been supported by a Steering Group. This has been led by the Council's public health team and had representation, advice and support from the Council's communications team, the medicines optimisation team at Sunderland Clinical Commissioning Group, Sunderland's Local Pharmaceutical Committee, a representative from Healthwatch Sunderland and representation from North of England Commissioning Support.
- 3.2 The Steering Group made an assessment of needs based on the JSNA and additional information collected as part of the PNA process. In making this assessment, there was a need to "have regard to the different needs of different localities within the area". In accordance with the regulation, the Steering Group considered how to assess these different needs. It concluded that the most appropriate means of dividing the Sunderland area was to adopt the five locality areas used by both Sunderland City Council and Sunderland Clinical Commissioning Group.
- 3.3 The Steering Group also made an assessment of the current services available from community pharmacies in Sunderland. Information about opening hours was provided by NHS England, and data was collected about the services that are currently commissioned.
- 3.4 A questionnaire survey was used to gather views about local pharmacy services from the public and a range of agencies and groups. This was made available online between 12th January 2022 and 1st February 2022 through Sunderland City Council's website with the survey title "Help improve your local pharmacy services". The survey was promoted using social media and through the Sunderland City Council, Healthwatch Sunderland and Sunderland Local Pharmaceutical Committee websites. In total 152 survey responses were received. These provided useful insights about the views of the public which informed the PNA.
- 3.5 A questionnaire for community pharmacies was made available on-line over December 2021 and January 2022, with support from the Local Pharmaceutical Committee. This questionnaire gathered information on facilities which are available in community pharmacies and commissioned and non-commissioned services which pharmacies currently provide. A total of 32 out of 64 community pharmacy contractors responded, which was a response rate of 50%.
- 3.6 Information was also gathered about services provided in neighbouring areas which can be accessed by residents of Sunderland, and therefore provide a more complete picture of any potential gaps in service provision.

¹ [Pharmaceutical needs assessments: Information pack for local authority health and \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

4. Consultation

4.1 The regulations require the Health and Wellbeing Board to consult for a minimum of 60 days with the following statutory consultees about the contents of the PNA:

- the Local Pharmaceutical Committee;
- the Local Medical Committee;
- all those currently on the pharmaceutical list in the City;
- HealthWatch Sunderland, and through them with any other patient, consumer or community groups with an interest in the issue;
- all NHS foundation trusts providing services in Sunderland;
- NHS England and NHS Improvement;
- Health and Wellbeing Boards in South Tyneside, Gateshead and County Durham and; and
- North East and North Cumbria Integrated Care System (ICS).

4.2 The statutory consultation period will run from the end of March to the end of May 2022. A downloadable copy of the consultation draft Pharmaceutical Needs Assessment (PNA) for Sunderland document and on-line consultation questions/feedback form are available at: www.sunderland.gov.uk/pna. Following the consultation period, the draft document will be updated to reflect any new information relevant to the PNA. The statutory consultees have been made aware of the consultation directly and provided with the link to the document and an on-line consultation questionnaire.

4.3 The document has been shared with Health and Wellbeing Scrutiny Committee. In addition, responses from a wide range of agencies and individuals are encouraged and are welcomed.

4.4 The document will be further revised after consideration of the comments received and findings of the statutory consultation. A final version of the PNA for Sunderland will be brought back to the Health and Wellbeing Board at its scheduled meeting in June 2022 for final approval and sign off. Following this, it must be published by 1st October 2022.

5. Key Findings

5.1 There are 60 community pharmacies in Sunderland, located primarily in areas of higher population density and in or near to areas with the highest levels of deprivation and which patients can visit in person. In addition, there are 3 distance selling pharmacies and 3 appliance contractors, making a total of 66.

5.2 The pharmacy services in Sunderland include 56 standard contract (40 hour) pharmacies. In addition, there are four 100 hour pharmacies. There are no dispensing doctor's services in Sunderland.

5.3 Residents of Sunderland have good access to community pharmacies, having a greater number of pharmacies per 100,000 population than the England average. Sunderland East is particularly well served which allows for more

patient choice and easier access. Whilst Washington has a smaller number of pharmacies per 100,000 population than the England average, it benefits from two 100 hour pharmacies.

- 5.4 Overall, there are four 100 hour pharmacies out of the total of 66 pharmacies in Sunderland. These provide extended and out of hours cover for pharmaceutical services across the city; all four open on both Saturdays and Sundays. In total, 38 pharmacies open on Saturdays and 9 pharmacies open on Sundays to respond to the needs of the local population.
- 5.5 As well as provision of the NHS England and NHS Improvements (NHSE&I) essential pharmacy services, a reasonable number of community pharmacies provide NHSE&I advanced services that seek to improve the safe and effective use of medicines. These services include services such as the new medicines service and the more recently introduced hypertension case finding and community pharmacy consultation services that can support the effective management of long-term conditions.
- 5.6 Additionally, a range of locally commissioned services are currently being commissioned either totally or in part from community pharmacies. These can be put in place by commissioners such as the Council or Sunderland Clinical Commissioning Group. When pharmacy provision is viewed alongside that of other service providers, it is considered that provision of existing locally commissioned services across Sunderland is adequate and meets identified health needs. For some services, access and equity of provision could be improved and other community pharmacies would be willing to provide these services if commissioned.
- 5.7 Community pharmacies make a valuable contribution to the objectives of the Healthy City Plan (Joint Health & Wellbeing Strategy) and engagement work shows that people value the services provided by their local community pharmacy.
- 5.8 Since the 2018 PNA, two 40 hour pharmacies and one 100 hour pharmacy have closed in the Sunderland area. Also, one distance selling pharmacy has opened. However, there continues to be adequate pharmacy provision across the area and there is no current requirement for additional pharmacy provision through market entry.
- 5.9 Also, since the last Sunderland PNA there have been a number of changes to the wider Sunderland Health System, in particular with the development of Primary Care Networks and the Integrated Care System. These changes have included development of the pharmacist role in the healthcare system and is it important to ensure that community pharmacy continues to be integral to these developments. These changes seek to improve integration of services and provide increased hours of service. Medicines optimisation approaches are and will continue to be used to effectively contribute to Sunderland's key health challenges.

- 5.10 The Sunderland economy of community pharmacies has been relatively stable since the last PNA, with no changes resulting in identification of gaps. However, it is not certain that this stability will continue and any changes occurring in the life of the next PNA will need to be considered fully to ensure their impact is understood.

6. Emerging Conclusions and Draft Recommendations

6.1 Emerging conclusions from the PNA process are:

- 6.1.1 Community pharmacy services play an important role in supporting the services provided by GP practices and Primary Care Networks as reflected by the changes in the essential, advanced and locally commissioned services as described in the report.
- 6.1.2 Sunderland has an adequate number of community pharmacies to meet the needs of patients who require essential services such as dispensed medicines.
- 6.1.3 There is currently adequate provision of NHS pharmaceutical services across Sunderland.
- 6.1.4 There is no access to community pharmacy services within the Coalfields locality during most of the extended GP hours on weekday evenings and generally on Sundays and weekday evenings. Though these wider opening hours are not classified as part of essential services, their availability in the locality could improve access and choice for the local population. This does not highlight a specific need for additional community pharmacies in the Coalfields locality though access issues should be better understood to establish whether any further action is required.
- 6.1.5 The existing 100 hour pharmacies are essential to meet the needs of patients by extending access to pharmaceutical services outside core hours when other pharmacies are closed.
- 6.1.6 Loss of any of the 100 hour pharmacies could cause significant gaps in access to both essential pharmaceutical services and locally commissioned services that respond to particular population health needs.
- 6.1.7 In addition to the four 100 hour pharmacies, a number of other pharmacy services, located in shopping centres and supermarkets, provide extended opening hours as supplementary hours which, if reduced could impact on access for the population of Sunderland.
- 6.1.8 The level of planned development is unlikely to require new pharmacy contracts to be issued for the areas of development within the time period covered by this PNA, due to satisfactory cover from already existing pharmacies.

- 6.1.9 A reasonable number of community pharmacies provide advanced services that seek to improve the safe and effective use of medicines. We would wish to encourage community pharmacies to make greater use of these advanced services.
- 6.1.10 There is adequate provision of existing locally commissioned services across Sunderland, although access and equity of provision could be improved for some services. Other community pharmacies would be willing to provide these services if commissioned.
- 6.1.11 With regard to locally commissioned services, the public health team should work with the CCG and PCNs to ensure that services are commissioned to meet local health needs and that any changes serve to maintain or improve equity, access and choice.
- 6.1.12 Out of area provision impacts not only the delivery of dispensing services but also the provision and accessibility of enhanced or locally commissioned services, especially where areas border each other. Commissioners should take cross border issues into account and consult with relevant stakeholders when they are reviewing, commissioning or decommissioning services, to avoid or mitigate against creating inequity of provision for the local population.
- 6.1.13 The PNA concludes that residents of Sunderland have good access to community pharmacies, having a greater number of pharmacies per 100,000 population than the England average. Sunderland East is particularly well served which allows for more patient choice and easier access. Whilst Washington has a smaller number of pharmacies per 100,000 population than the England average, it is well served by two 100 hour pharmacies.
- 6.1.14 Community pharmacy already makes a significant contribution to the delivery of the Healthy City Plan.
- 6.1.15 The Board wish to acknowledge the contribution that community pharmacy services have made to the recent Covid Pandemic response.

6.2 Emerging recommendations from the PNA process are:

- 6.2.1 Commissioners take cross border issues into account and consult with relevant stakeholders when they are reviewing, commissioning or decommissioning services, to avoid or mitigate against creating inequity of provision for the local population.
- 6.2.2 Commissioners should consider the opportunities afforded by community pharmacy enhanced services that focus on the safe and effective use of medicines and support for self-care, within the context of the current financial constraints for the health economy.
- 6.2.3 With regard to locally commissioned services, the public health team will work with the CCG/ICS to ensure that services continue to be commissioned to

meet local health needs and that any changes would serve to improve equity, access and choice.

- 6.2.4 Patterns of provision will need to be kept under review in the event of loss of community pharmacies from the Sunderland health economy and in response to further changes in the Sunderland health system.

7. Recommendations

7.1 Members of the Health and Wellbeing Scrutiny Committee are asked to:

- Note the work that has been undertaken so far to produce an updated Pharmaceutical Needs Assessment (PNA) for Sunderland in line with the Health and Wellbeing Board's statutory duty;
- Note the dates for the statutory consultation on the PNA and the opportunity for the Committee or Members to comment on the PNA; and
- Consider and provide any comments they have regarding the draft statement of pharmaceutical needs assessment arising from the PNA process detailed above.

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