

Executive Summary

It is a statutory requirement for a Pharmaceutical Needs Assessment (PNA) to be developed and published every three years (or earlier where significant changes have occurred) by each area covered by a Health and Wellbeing Board (HWB). The purpose of the PNA is to plan for the commissioning of pharmaceutical services and to support the decision-making process in relation to new applications or change of premises of pharmacies.

This PNA has been undertaken during a time of uncertainty around how pharmacy services will develop over the next three years. The 2016 Murray report recommends major changes to the way in which pharmaceutical services should be delivered. Key changes to the Pharmacy Contract include simplifying the NHS pharmacy remuneration system, helping pharmacies to become more efficient and innovative and encouraging longer prescription durations where clinically appropriate. However, at the time of writing, these recommendations have not yet been implemented given they are currently under judicial review. It is complex to predict the impact on residents of such changes before it is understood which services may be reduced, changed or closed.

Since the last Waltham Forest PNA was published in 2015, no major changes to pharmaceutical provision have been observed and provision is generally good. There are 60 community pharmacies in the Waltham Forest HWB area for a population of 271,100, an average of 22 pharmacies per 100,000 population, close to the England and London averages of 21.3 and 21.4 respectively. All localities have at least one community pharmacy, however the rate varies across the borough with the south having a greater number of pharmacies per head of population than the north.

Overall access is good. In addition, all localities have services available during weekday evenings, Saturdays and Sundays.

Demand for community pharmacies may eventually increase due to national policy and population growth. Current national policies highlight the potential of community pharmacy to deliver enhanced community-based healthcare access thereby reducing demand on urgent and primary care services.

A review of the Joint Health and Wellbeing Strategy (JHWS) and Joint Strategic Needs Assessment (JSNA) identified that there may be scope for pharmacies to support more local health needs. The borough continues to experience deprivation with high rates of unemployment with the demography comprised of a young, fast growing, mobile population.

Addressing many of Waltham Forest's 'areas of opportunity', as identified in the JSNA and JHWS, could include an expanded role for pharmacists. Priority areas identified by the Health and Wellbeing Board (HWB) in which there are potential roles for pharmacists are:

- Children and families
- Adults
- Infectious diseases
- Long-term conditions
- Older people.

Other priorities that pharmacists could play a role in include collaborating with initiatives aimed at reducing domestic violence, and supporting enhanced promotion of the following: cancer detection and care; Flu vaccination amongst Health Care Workers; improved housing with a focus on vulnerable adults; monitoring of hospital admissions caused by injuries in children; diabetes prevention; living well with people with multiple chronic illness; improved end of life care and monitoring the tipping point into need for health and care services

Decisions concerning the promotion of pharmacist led services for these programmes will need to be based on more focused health needs assessments and commissioning strategies.

The pharmacy user and public stakeholder engagement identified that many of them found pharmacy opening times to be good and pharmacy staff friendly. However, there was concern in some quarters about the ability to have confidential discussions.

Conclusions

The Waltham Forest HWB has updated the information in relation to pharmacy services in its borough as well as information regarding changes in pharmacy services. In addition, the HWB has reviewed the current health needs of its population in relation to the number and distribution of the current pharmacies in the borough and those pharmacies in neighbouring boroughs adjoining the borough.

Based on the latest information on the projected changes in population of the HWB area within its geographical area over the next three years, alongside the latest information regarding building plans and expected additional population increases during this time, the HWB has concluded that the current pharmacy services are adequate and have a good geographical spread.

The detailed conclusions are as follows:

- **There is no evidence of substantial current gaps in the provision of essential services across the borough**

Notes- Essential services are services that must be provided by all community pharmacies across England as part of their core contract with NHS England. These include dispensing of medicines and appliances, disposal of unwanted medicines, signposting to local services, and promoting self-care and health promotion messages.

- **There is no evidence of substantial current gaps in the provision of advanced services across the borough**

Notes- Advanced services are services that pharmacies may choose to provide as part of their core contract. These include services like flu vaccination, and supporting patients to use their medicines or equipment correctly to get the most benefit from them (new medicine service, medicine use reviews, appliance use reviews).

- **There is no evidence of substantial current gaps in the provision of enhanced services across the borough**

Notes-Enhanced services are additional services that pharmacies can be asked to provide through an arrangement with NHS England teams, to meet the specific needs of the local population. Locally, these services include support for common health problems like aches and pains, skin conditions and stomach upsets (known as minor ailment scheme)

- **There is no evidence of substantial current gaps in the provision of locally commissioned services across the borough.**

Notes- Locally commissioned services are additional services that pharmacies can be asked to provide through an arrangement with Clinical Commissioning Groups or Local Authorities, to meet the specific needs of the local population. Locally, these services include chlamydia screening, and contraceptive provision.

Based on the research carried out, the current provision of pharmaceutical services is expected to be adequate to meet the needs of the population over the next 3 years. Population increase is expected particularly in the south west of the borough. The conclusions in this report are based significantly on the data available and future assumptions at the time of reporting. The situation is fast moving and it will be important to undertake an annual review of the evidence and assumptions to keep these conclusions up to date.

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