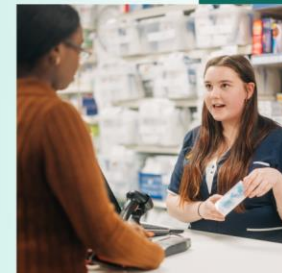


South East Region

March 2024

Gary Warner
Committee Member
Regional Representative – South East

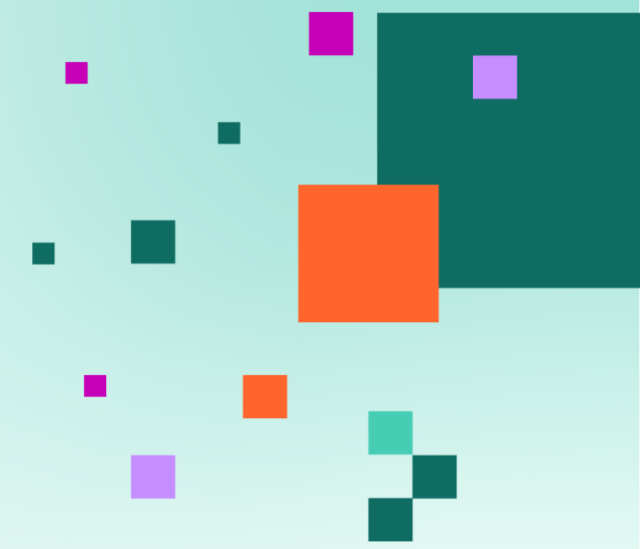


In this update

- Current situation
- Recovery Plan and Pharmacy First
- Negotiations for 2024/25 and beyond
- Influencing and strategy for the future



Current situation



Pressures and other challenges

- Years of financial and operational squeezing now pushing sector to the brink
- Many pharmacy owners battling for survival
 - Consolidations, cashflow and closures
 - Workforce pressures and increases to the National Living Wage due
- Heading out of a difficult winter with new service launches and swings in reimbursement and IT challenges
- It's extremely hard to be optimistic about the future at the moment
- In December we wrote to Ministers and coordinated parliamentarians' letters calling for urgent consideration of core funding and margin impacts , prior to the negotiation mandate



CPE Meeting summary

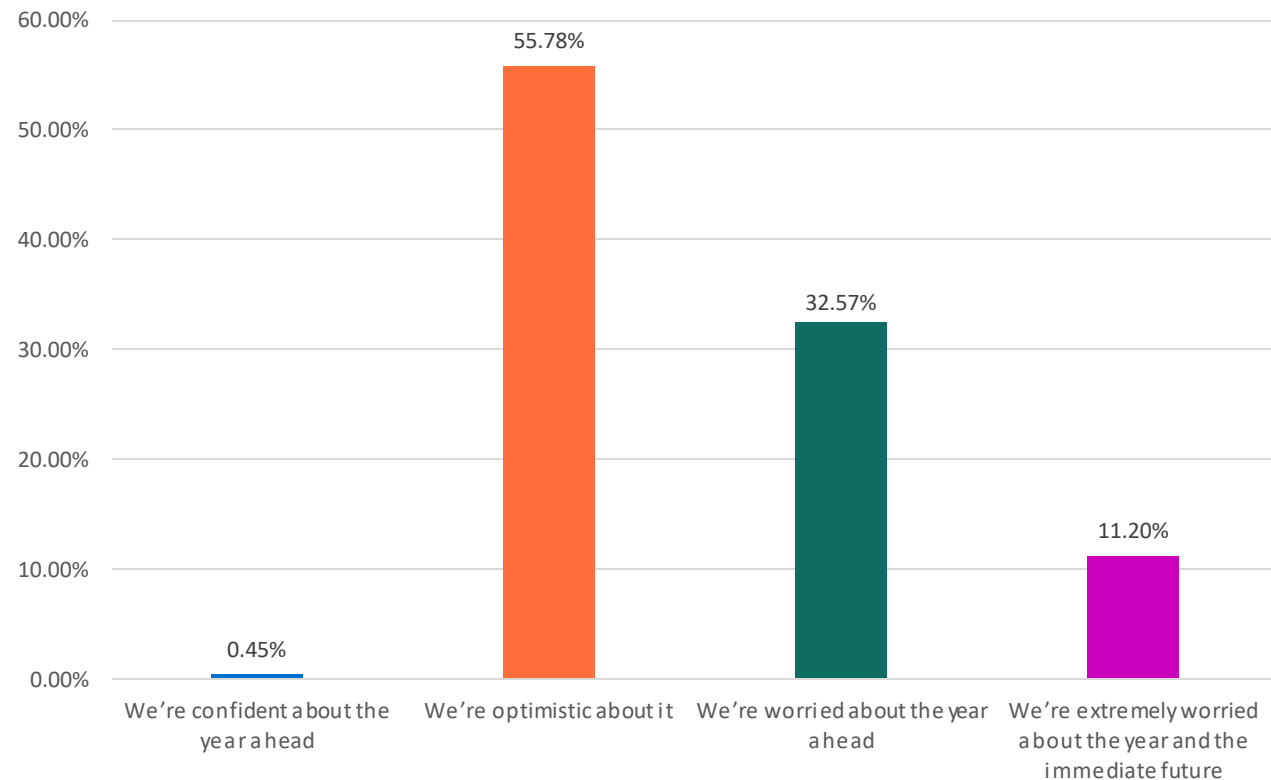
- The full Committee met in London on 31st January and 1st February.
- We considered Pharmacy First implementation and important issues such as margin, severe pressures in the sector and the upcoming 2024/24 negotiations.
- Other items included strategic issues such as supporting future negotiations, the strategy for Community Pharmacy England.
- Ongoing improvements to Governance were approved and we revisited the Committee's composition.
- We discussed sector opinion polls which had been undertaken to inform the meeting on preparations for the new Pharmacy First service, and the views of owners about the outlook for businesses in 2024.
- The results hearing from over 4200 premises were reviewed by all Committee Members ahead of the meeting, augmented with feedback from the Regional Representatives from LPCs at the meeting.
- The feedback was used to help shape the committee discussions.



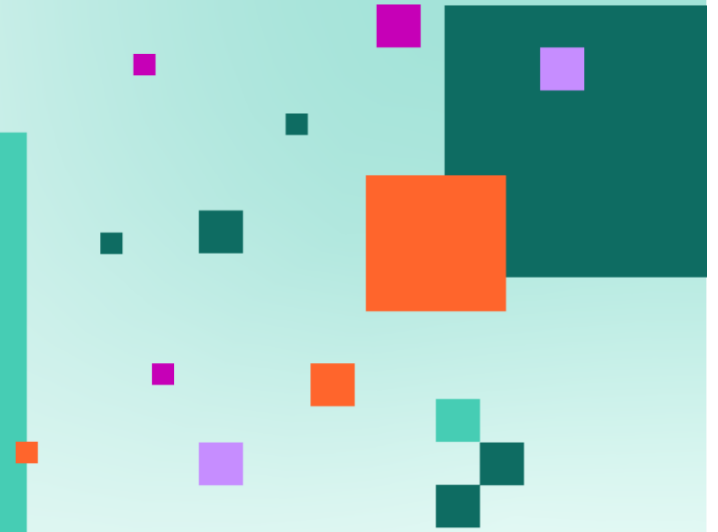
Sentiment About the Year

- More than 40% are worried or extremely worried, however 55% showed positivity, being optimistic about the year ahead, coinciding with the launch of Pharmacy First

How is your pharmacy business faring going into 2024



Recovery Plan & Pharmacy First



A significant investment and win for the sector

- Building on the immense role of pharmacies during the pandemic
- High levels of public trust and confidence
- And continuing challenges of accessing GP services
- The public and patients have turned to us



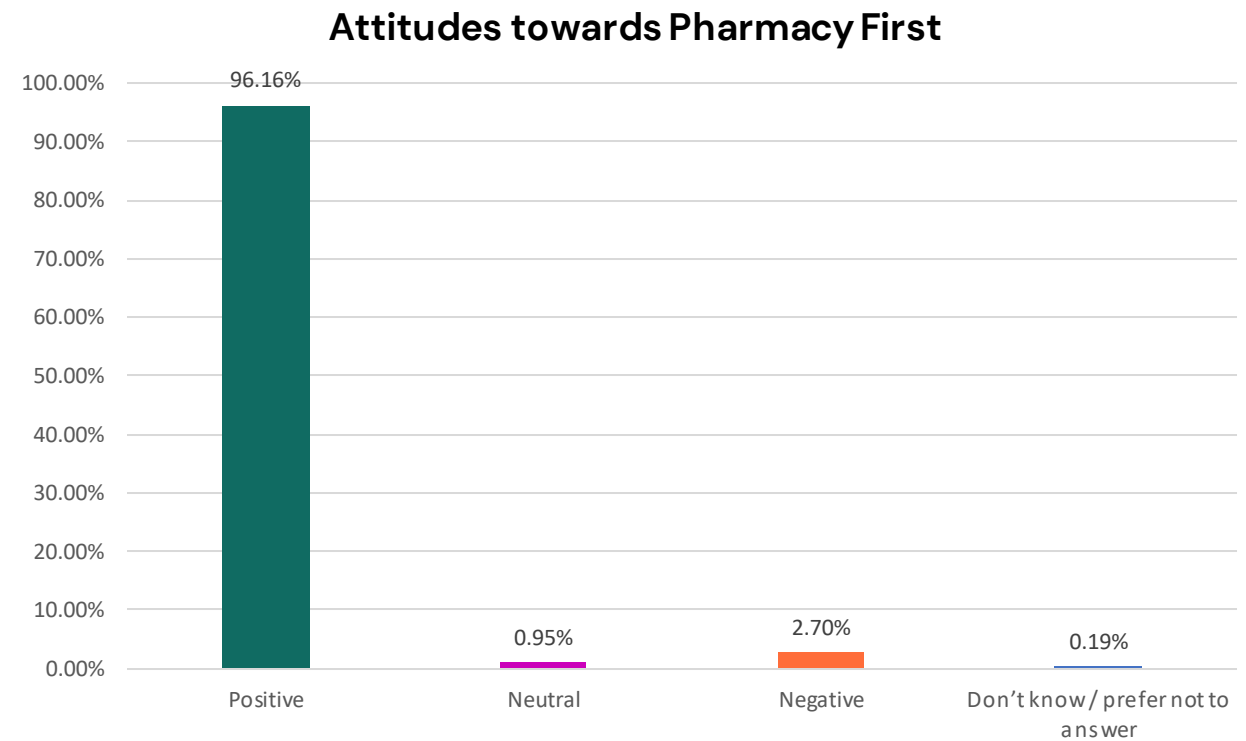
With the goal of freeing up 8-10 million GP appointments

- Ministers looking for solutions when there are few to be found in the NHS and public services
- Making best use of the skills of Pharmacists and pharmacy teams and their professional competencies
- To free up GP's time dealing with minor illnesses to focus on detection of more serious and critical illnesses and diseases
- With particular focus on PGDs and Independent Prescribers in future – delivering more clinical services



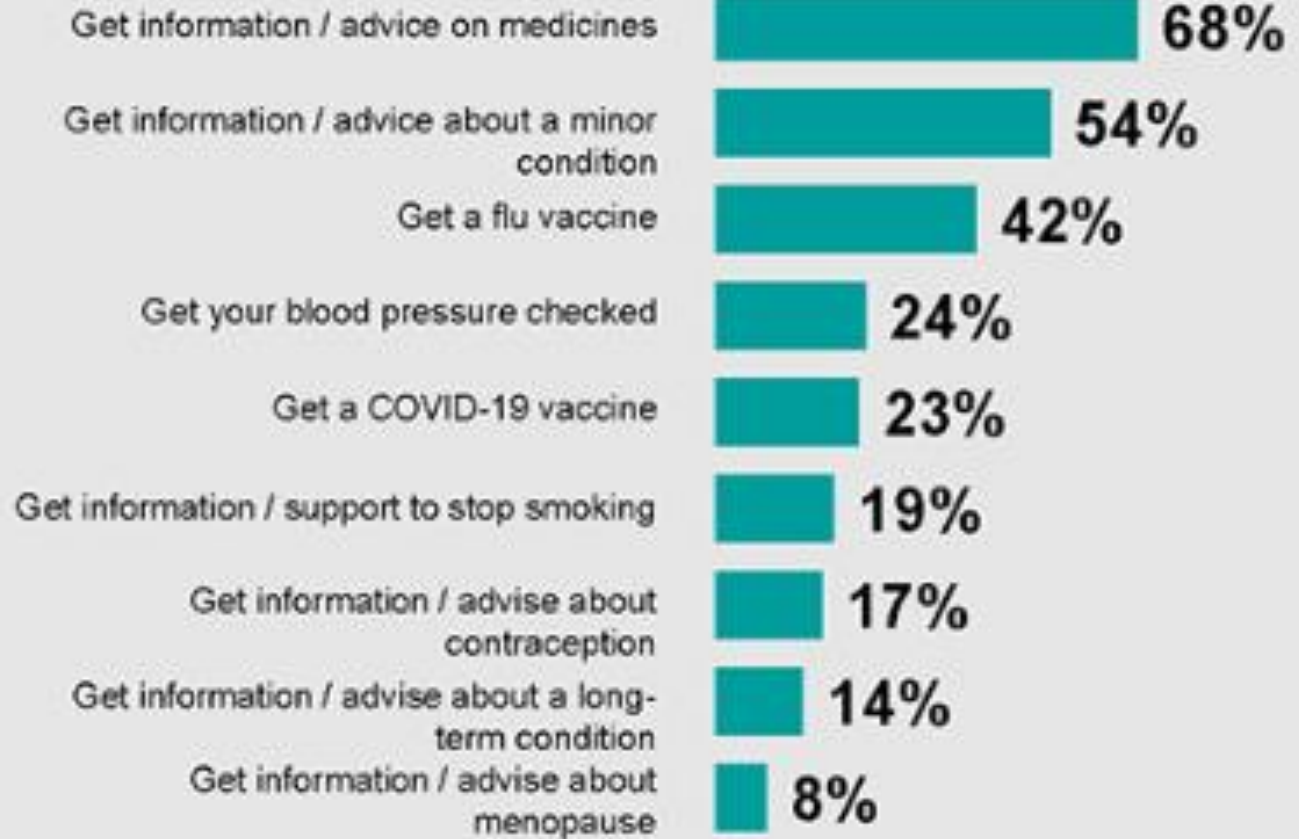
Attitudes Towards Pharmacy First

- Clear support and positivity for Pharmacy First from the sector, matching the high level of sign-up by pharmacies in England



SERVICES PROVIDED BY PHARMACIES

Pharmacies are the place the public are most likely to go to for information and advice on medicines and minor conditions or illnesses



Pharmacy First



- Launched on **31st January 2024**
- Advice and treatment for **seven common conditions**
- It includes **self-referring patients**
- And existing referral routes : **CPCS, NHS 111 and referrals from UEDs incorporated into the new service**

A further investment in two key services:



Pharmacy Contraception Service

- Enabling **initiation of oral contraception**, as well as continuing to provide ongoing management of oral contraception initiated elsewhere
- Pharmacies will **need to provide both elements** of the service

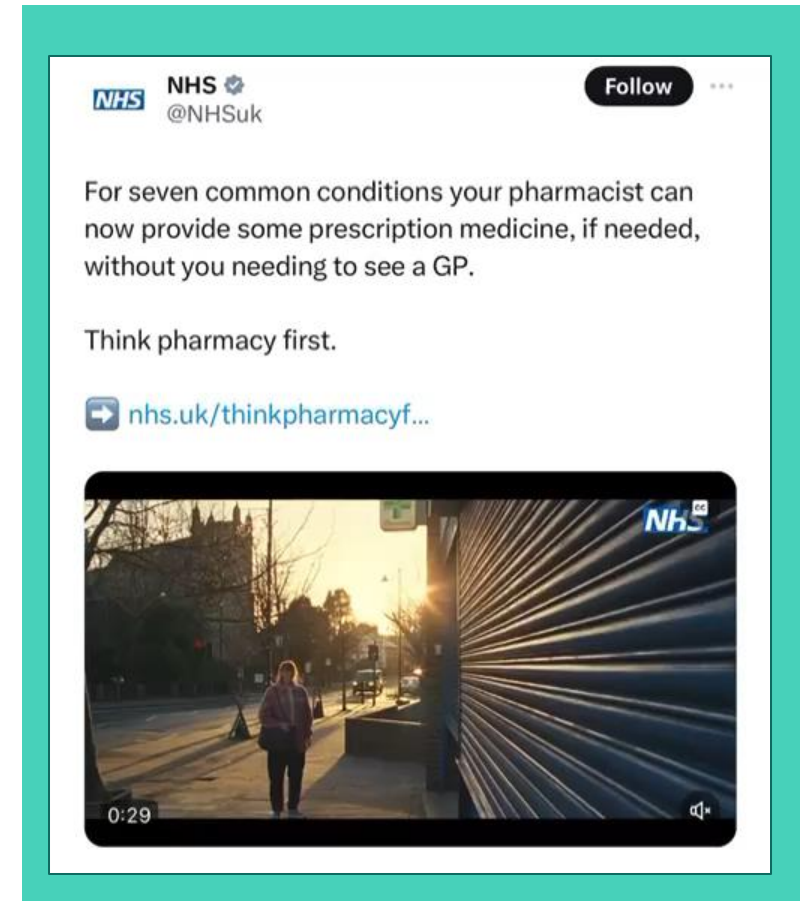


Hypertension Case-Finding Service

- Re-launch of Hypertension Case-Finding Service to make **better use of skill mix** and **increase provision of ABPM**
- All **suitably trained and competent pharmacy staff** able to provide the service

Media campaign

- NHSE is developing a public campaign after launch and later in the year that aims to:
 - increase awareness of Pharmacy First and the key conditions
 - begin to prompt long-term behavioural change
- TV adverts plus media, physical sites and social media tie-ins
- Running from 19th February, with potential for future waves of activity
- NHSE also preparing specific comms for GPs and primary care, locum agencies etc





Why is it so important?

A significant investment for the future

- A **foundational service** upon which future clinical services can be built
- **Further conditions could be added to Pharmacy First** and
- **Widen use of PGDs and IPs**
- **BP service** – Atrial fibrillation, cholesterol, diabetes and CVD
- **Oral Contraception** to wider contraception, HRT and women's health services



Links to the potential identified in The King's Fund and Nuffield Trust Vision

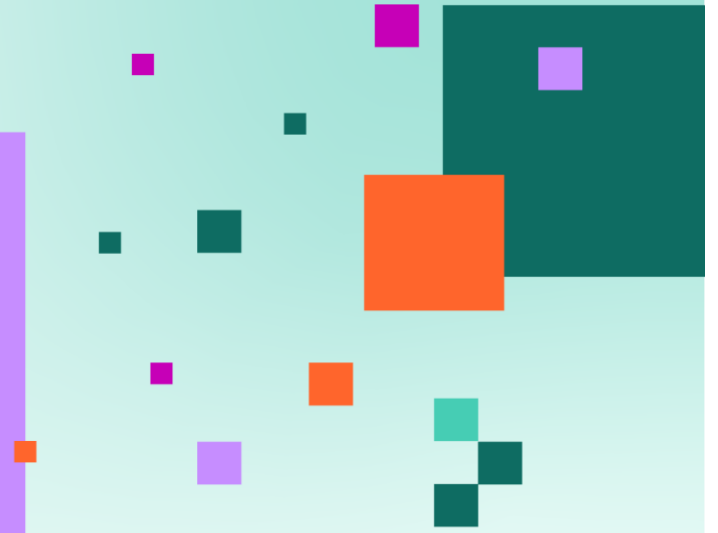
Preventing ill-
health and
supporting
well-being

Providing
clinical care
for patients

Living well
with
medicines

Part of integrated
primary care
offer for
neighbourhoods

Negotiations for 2024/25 & beyond



We continue to fight for sustainable funding

- PCRFP funding won't solve pharmacy's funding crisis
- Negotiations on the 2024/25 CPCF have now started – delayed by the recent change in Ministers in the December reshuffle
- The Committee has discussed in detail our key asks, priorities and red lines. We're also continuing to press for further investment and support through our influencing and advocacy work
- We have heard from hundreds of pharmacy owners (covering thousands of premises) via our recent opinion polls, to help shape our asks.



CPCF 2024/25

- A national Pharmacy First service **helps build leverage and the imperative for sustainable funding – we need to be open to deliver the service.**
- Not expecting major new developments/additions to contract given the PCRFP.
- But inevitably will be framed by Spending Review parameters, NHS demands and overall public spending pressures. And perceptions of 'new money' already in the system...



Asks

- **Additional funding** to the core contract sum
- **Agreed mechanism for annual uplift to funding and fees**
- **Write-off** of any money that is owed
- **Fundamental reform of the margin delivery framework** and economic review of the medicine supply chain
- **Easing workload** through operational changes and promised efficiencies and further improvements to price concessions system



The building blocks for the next CPCF

Economics and value

- NHS Economic review
- Economic and social value /ROI
- Service pipeline business cases

Inflationary provision/indexation

- Raising baseline and inflationary uplift
- Fee rates
- Alternatives to caps

Alternative funding mechanisms

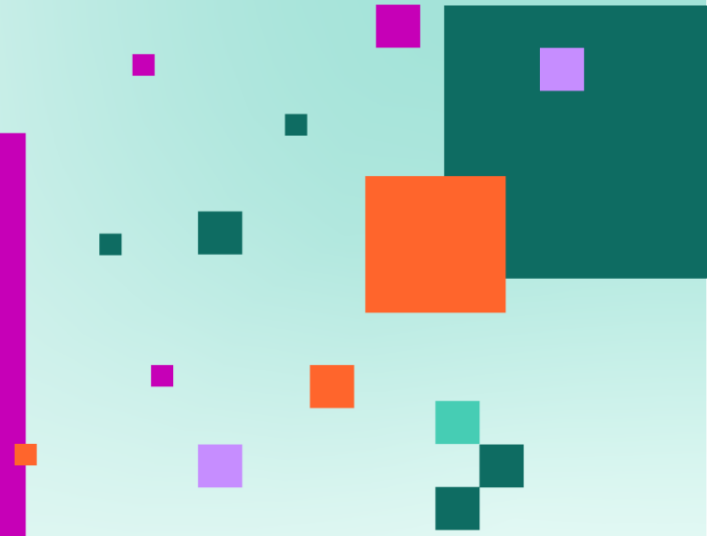
- Establishment or core costs
- Shared incentives for services
- Simplification of payment mechanisms

Margin

- Review of supply chain issues, margin and reimbursement system
- Enhance margin provision
- Alternative models/Benefit sharing

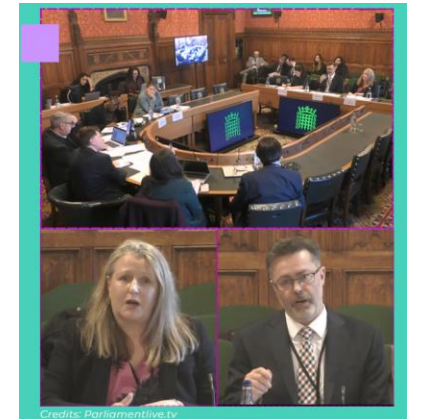
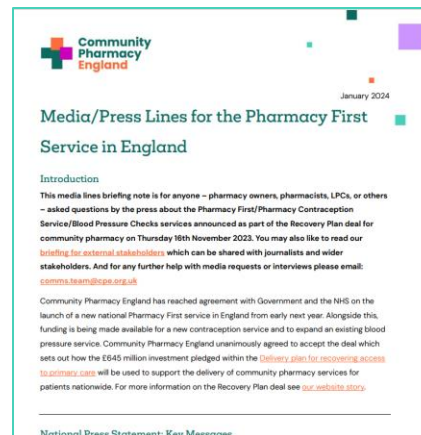


Influencing & strategy for the future



Comms and Public Affairs work

- Communications to support the NHS Pharmacy First campaign are ongoing – media lines for LPCs and pharmacy owners
- Parliamentary launch event last week
- And we are continuing to influence manifesto-writers across all parties: new briefings to be published shortly



Critically in 2024

- Monitoring delivery of Pharmacy 1st
- Economic consultancy, negotiation training and strategy
- CP Sector Strategy and CPE Strategy
- We continue with our influencing and engagement strategy to input to the party manifestos and build trusted relationships
- Promote community pharmacy as a vital element in primary care, close to patients in every community
- Who can do a lot more to support patients' well-being and healthcare – as evidenced by The King's Fund/Nuffield Trust Vision
- With the right funding and core capacity



Questions