Keeping up with the new NHS:

System, Place, Neighbourhood

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Background:

For some in the NHS, 2022 may have felt like a welcomed end to eight years of planning, consulting, piloting and restructuring, with the Health and Care Act finally receiving a legal mandate and announcing the new system of Integrated Care to us all. However, the reality for those working in, and alongside, the NHS, is that their hard work may in the short-term, become even harder. Recent years have been tough on everyone within the NHS, with the restructure plans coinciding with the ongoing pressures of the covid pandemic, an ageing population, and an over-stretched workforce. Now, local priorities need to be agreed. New structures, collaborations, and care pathways, need to be shaped and learned. New finance systems and incentives need to be understood. And critically, staff at all levels need to understand the new systems, and be trained to operate effectively and efficiently within them.

If 2022 was the end of the theory, then 2023 is the start of the practice.

For those working alongside the NHS, staying one step ahead is essential. Healthcare manufacturers have a unique opportunity to support our NHS colleagues in making the transition to integrated care less daunting, burdensome and administrative, and instead, more exciting, enthusing and energising – helping them to achieve the core aim of the Health and Care Act, of having genuine freedom to shape local care in an effective way, and to provide outstanding health to our communities.

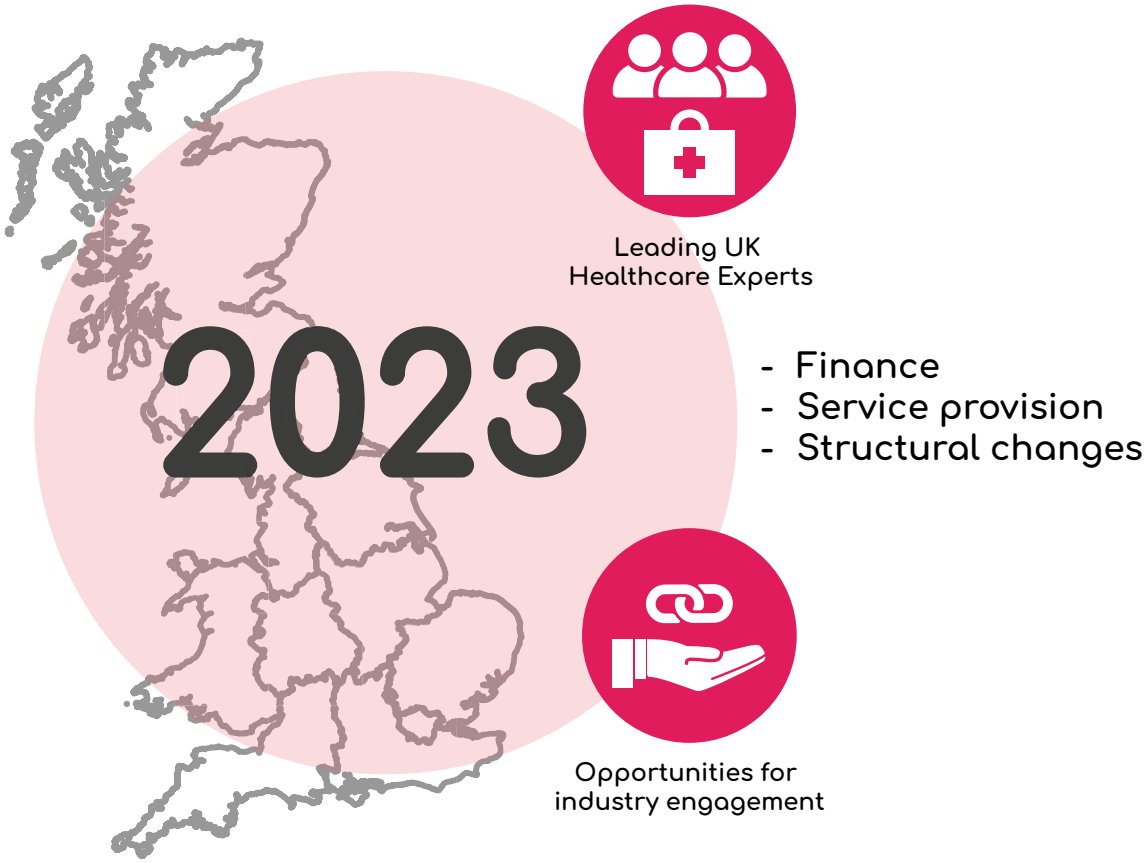


Methodology:

This report shares unique insights from critical decision makers within the NHS, giving a holistic view of the current state of evolution in the NHS, and an objective view on where support should be focussed. In February 2023, NeoNavitas conducted structured interviews with NHS professionals from varied roles spanning pharmacy, medicines management, commissioning, and senior leadership across system, place, and neighbourhood levels, questioning their current needs and challenges, as well as understanding how they viewed the current support offered by NeoNavitas and the broader pharmaceutical industry.

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Specifically, we focussed on how NHS finances, service provision and structural changes were viewed, and how manufacturers of pharmaceuticals or MedTech should deploy their resources to ensure effective communication of their products, and promote access for patients within this new and challenging environment.



Results:

NHS Finance:

NHS funding will change most significantly with the decentralisation of budgets from NHS England (NHSE) to Integrated Care Boards (ICBs), allowing them to allocate resources to areas of local priority, and giving place-based partnerships and primary care networks more accountability for delivering efficient care.

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Our experts broadly agreed that recent changes in NHS finances were a good opportunity for taking local control of healthcare, however the speed of financial decentralisation and the ongoing financial deficit driven by covid, waiting lists, winter flu and monkey pox, all remain as key challenges. Our experts highlighted that while current media reports focus on secondary care and Accident & Emergency limitations, the real constraints are more urgent in primary and social care, in particular where post-covid infection control protocols inhibit operating at full capacity. The implication is that even where 'new' money is available at a local level, capacity to efficiently allocate these new funds is severely limited.

Examples of welcomed support included the quick-wins of identifying and informing Payers about the latest rebates to deliver immediate savings, and the longer-term support in designing care pathways and business cases to support the more efficient use of resources across the whole ICS.

While PCN's in their own right are thought to have a positive direction, some frustration remains in waiting for NHSE to put funding on the table to support local activities in the longer-term.

> "The single biggest challenge at the moment is capacity to deliver the world class care that is expected within the NHS."

> "The opportunities to improve patient outcomes are well recognised, but there is limited (or no) capacity to deliver them through specific projects."

NHS Service provision:

A consistent frustration from our experts was the limited front-line NHS capacity, and difficulties in driving change within an over-worked, post-covid workforce. While the direct pressures of covid have evolved since 2022, long-covid sufferers continue to present a new and challenging demand on health care. Our experts were continuing to look at how local healthcare could be delivered more efficiently but finding capacity to both design and implement new service pathways was difficult.

The paradox of this situation was well observed. Service innovation and redesign are clearly recognised as the solution to longer-term NHS capacity, but without sufficient human resource available to initiate new services, additional support is desperately needed. Our experts would welcome pharmaceutical industry or third-party support, to work in partnership towards freeing up capacity, redesigning patient pathways and sharing best practice across the UK.

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> Where I feel industry can support is by helping to support new business cases, including collating, and presenting data analysis to highlight best practice and potential savings. We are working hard to embrace new ideas and technologies but acquiring funding support can be slow and frustrating in the NHS.



NHS structural changes:

Our experts generally reported greater local autonomy under the new structure, and felt positive about the introduction of ICBs, but the major barrier to rapid evolution was again cited as capacity issues, with the urgency of "winter pressures" diverting activity away from designing and embedding new structures.

Clear structures and governance were inconsistent amongst our experts' regions, but all agreed that getting these right was critical to the future success of their local health system. Many reported that while local structural and process decisions were now being made in the top tiers of their ICB, the pace of change was likely to find a bottle neck when asking for action from the hands-on facilitators and implementers.

Again, the variation in progress between different regions was clear to see, with some already citing successes, and others expecting a slower reform while new ideas have 'time to settle'. Notably, the expectation for different health care providers to work together was cited as a challenge, in particular in areas where the workforce had been habitually working in silos.

> Navigating the new NHS structure has been a major challenge for us. It's difficult to keep up with the constantly changing landscape and concentrate on delivering high-quality patient care.

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> We need more industry players to be proactive in understanding the new NHS structure and for them to adapt their approaches accordingly... It would be great to see more collaboration between industry and the NHS to create more streamlined and effective processes.

Industry engagement:

Feedback from our experts was clear, increased collaboration with industry and third-party partners would be greatly valued to support the development of streamlined, effective, and economically efficient local health systems. Industry has a unique position to understand system-wide issues, and are ideally placed to propose innovative solutions and share best practice.

However, critically for effective engagement, our key finding is that how information is shared, how critical decision makers are engaged, and how individuals interact, are all as important to our NHS customers as the solution itself. When asked how industry can present themselves as trusted and valued partners, our experts were clear that the old model of selling drugs in isolation was no longer fit for their integrated care needs, and that the tone, scope and breadth of their conversations, all need to be appropriate before a trusted partnership is formed.

Individuals should have an expert understanding of the new NHS structure, finances and capacity constraints, showing sympathy with NHS workloads, and 'feeling the pain' of frustrated customers when presenting their ideas and solutions. The tone should be that of a critical friend, building trust through knowledge, and compassion, and industry should present goals which align to those of the NHS, focussing on patient care and NHS capacity, rather than on their own commercial success.

> It's important for the industry to be transparent and honest in their dealings with the NHS, to build trust and long-lasting partnerships.

> Industry can support organisations through this change process by being a critical friend and supportive ally, to ensure the short-term uncertainty does not derail ongoing transformation work.

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We further asked our experts what solution content would be welcomed, with the need for training (both in the new NHS structure and in overcoming organisations change), best practice sharing, and hands-on business case development, being the most consistent requests. Presentation of new drugs or technologies in isolation was consistently reported as unhelpful, with industry representatives repeatedly missing the bigger picture of their customers' whole health system needs and workload pressures, leading many to avoid routine contact with all but the most knowledgeable, transparent and empathetic partners.

> "Industry should continue to adapt, with a further shift away from 'promotion of product' to direct support with investment in partnership working with PCNs..."

The solution:

To consistently evaluate our performance and learn from critical feedback, NeoNavitas asked the experts how their interactions with our own personnel, differed from the industry norm. Many of the characteristics and qualities detailed above were positively underlined, with NeoNavitas personnel associated with excellent NHS knowledge, and an in-depth understanding of the capacity limitations and stresses experienced day-to-day by critical decision makers in the NHS.

> "NeoNavitas understand our challenges and the NHS changes, understand our pain, and converse on our level, with real solutions."

> "Working with NeoNavitas has been invaluable in helping us understand the new NHS structure and navigate the challenges... their skill is in relationship building, and rather than focussing on a product, they focus on what is right for the service and patient population."

> "NeoNavitas has a deep understanding of the NHS and how it operates, which is something we haven't seen from other organisations."

Our experts felt confidence and trust with the NeoNavitas team, viewing them as valued partners with patient centred motives underpinning their agenda and solutions. The NeoNavitas team were praised for their proactive knowledge of the NHS structure, finances, rebates, and practical, workable solutions shared from other ICS or PCN organisations. Our teams have achieved comprehensive integration with critical decision makers in the NHS, with barrier-free access based on trust, understanding, and delivery of proven solutions.

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> The approach taken by NeoNavitas is very different from what we've experienced from other organisations. They are problem solvers and innovators. They listen to our needs and work with us to find the best solutions.

> NeoNavitas understand well the complex NHS landscape and are seen as reputable honest brokers to bring NHS and industry together.

> NeoNavitas have given me a tailored approach to my queries. They have been responsive to my needs and requests in a timely and professional manner, and have come back with responses and solutions which genuinely support my needs.



We would love to see how we could support you to engage critical decision makers in the NHS. To find out more please email us at hello@neonavitas.com

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