



2023 Survey Review and Market Trends

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Gallagher Surveys





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The Labor Market in 3 Numbers





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10.1 Million

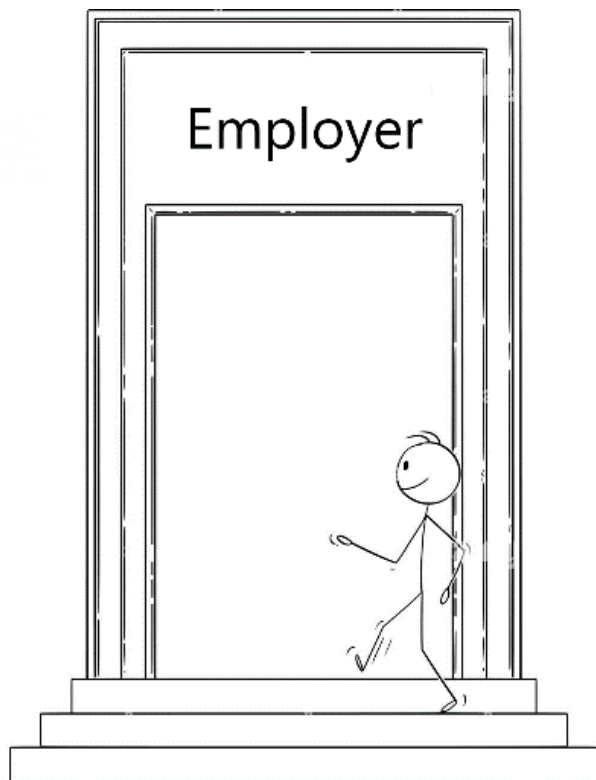
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Charities



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6.1 Million

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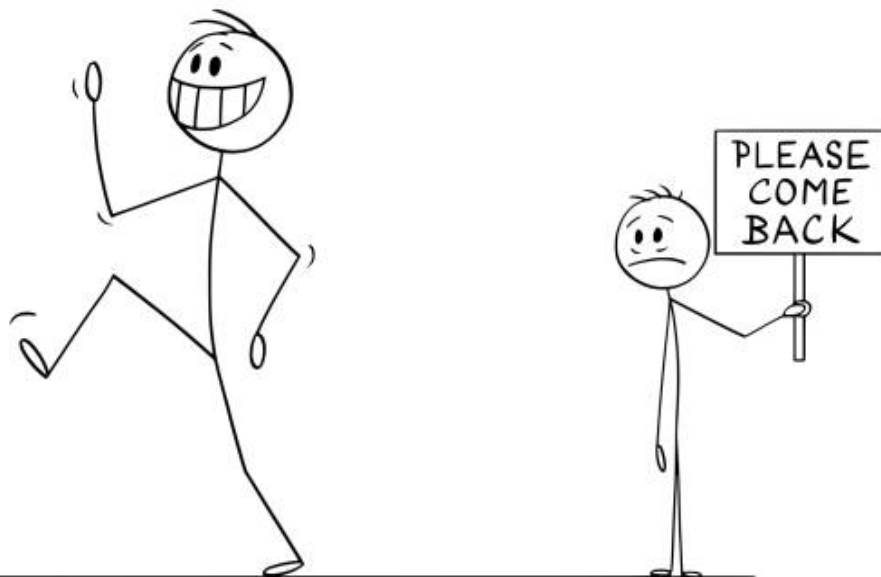
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3.8 Million



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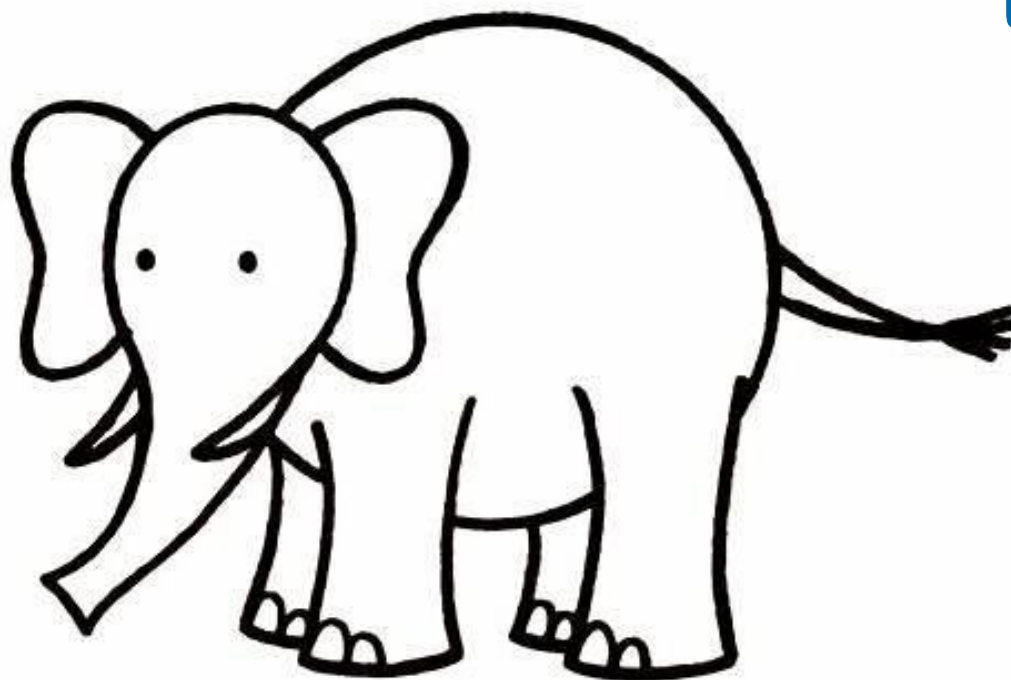
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The Elephant in the Room



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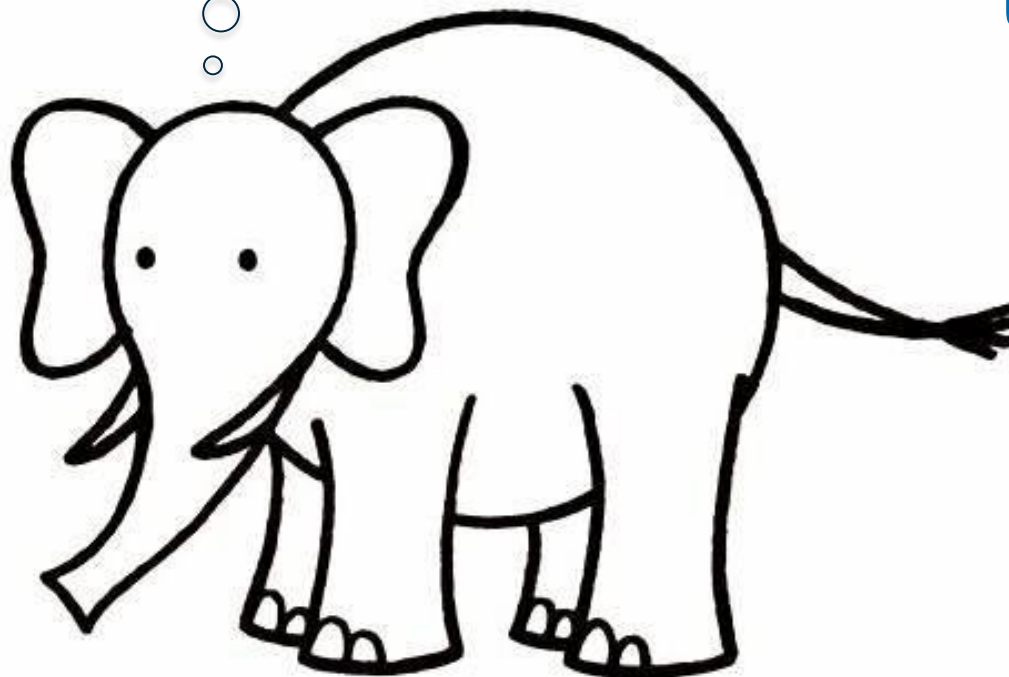


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Inflation
is 4.0%

The Elephant in the Room



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The item whose price went up the most over the past 12 months.



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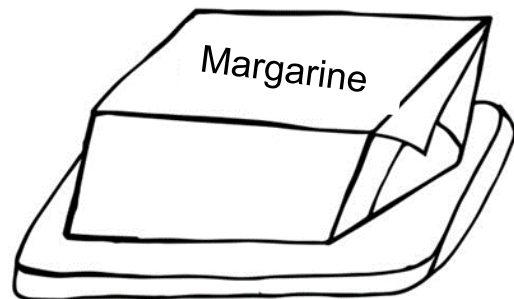


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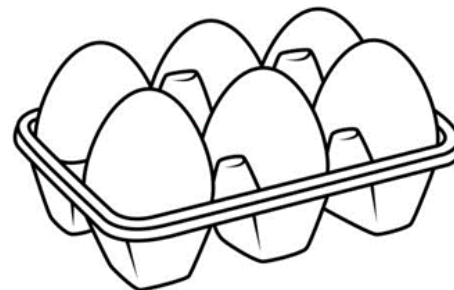


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23.8%



21.4%



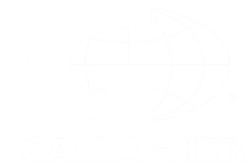
17.8%



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The essential item for human survival whose price fell by 20% over the past year.



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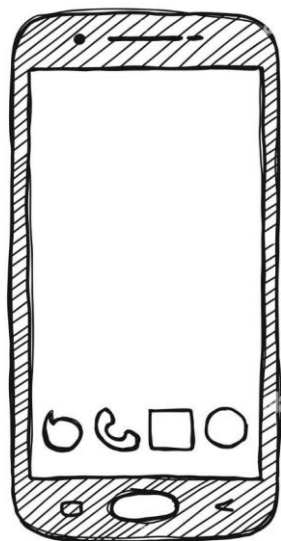


Chicago
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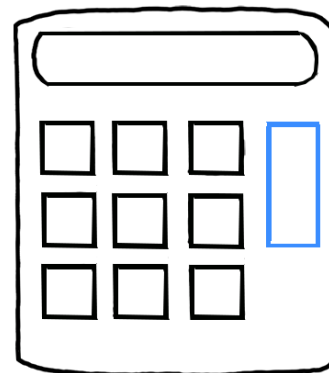


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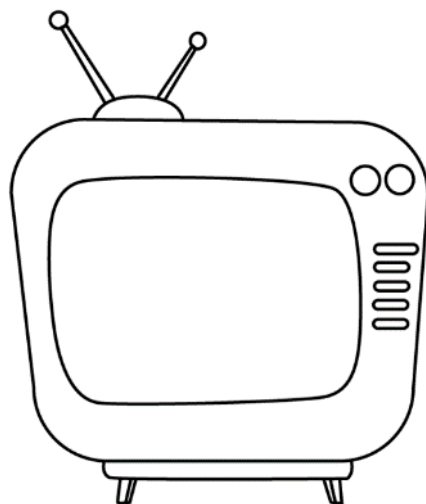
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-20.0%



-13.7%



-11.9%

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The CPI % movement for Bacon



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Positive Economic News

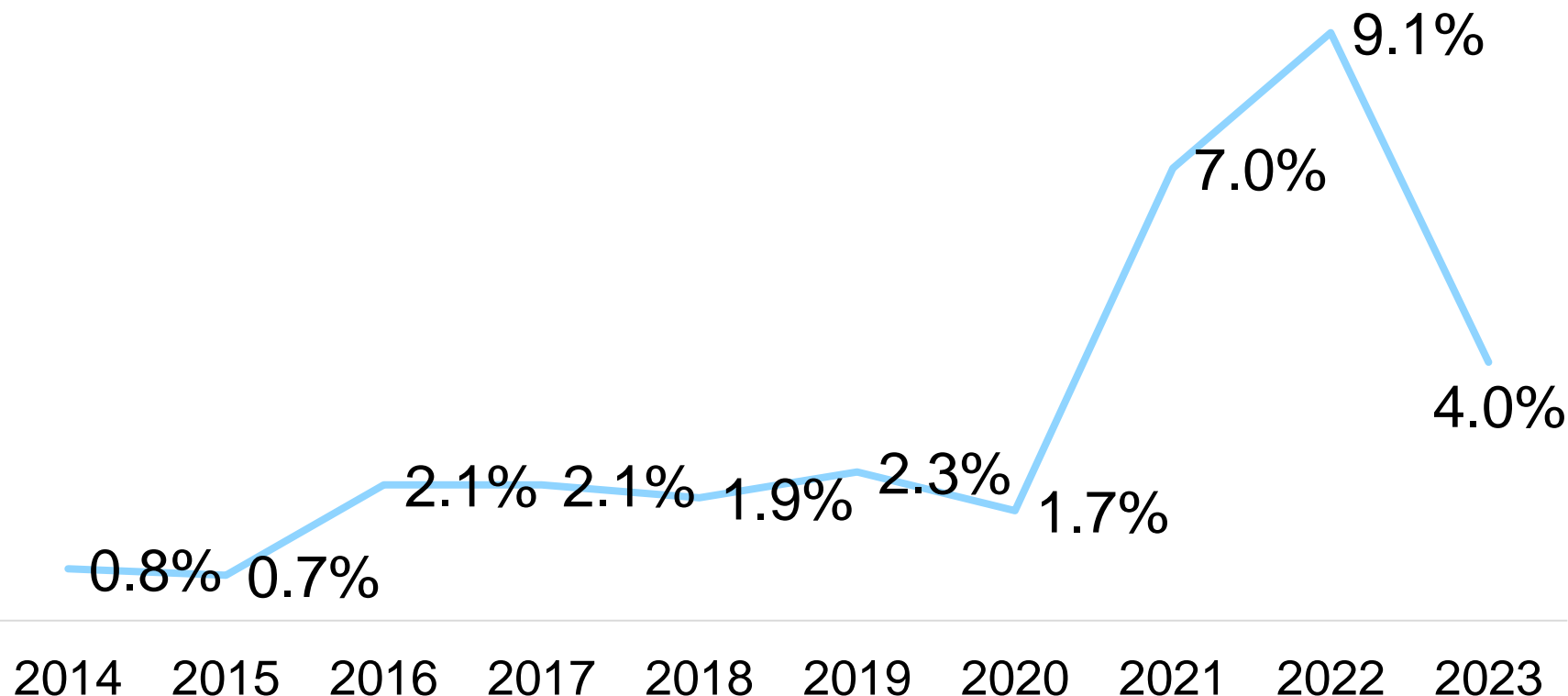


-8.9%





Inflation



Lowest inflation rate since March 2021





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Last Year

Top HR Priorities



“If he has a pulse, hire him!”



Top HR Priorities

2022

- 1 Retaining talent
66% of respondents
- 2 Attracting talent
57% of respondents
- 3 Creating a strong culture
31% of respondents



2023

- 1 Retaining talent
66% of respondents
- 2 Attracting talent
49% of respondents
- 3 Training and Development
35% of respondents

Improving Health/Wellbeing – 22%
Controlling Benefit Costs – 21%
Controlling Wage Costs – 12%



The Recent Labor Report

NEWS RELEASE BUREAU OF LABOR STATISTICS U. S. DEPARTMENT OF LABOR



Transmission of material in this news release is embargoed until 8:30 a.m. (ET) Friday, June 2, 2023

USDL-23-1196

Technical information:

Household data: (202) 691-6378 • cpsinfo@bls.gov • www.bls.gov/cps
Establishment data: (202) 691-6555 • cesinfo@bls.gov • www.bls.gov/ces

Media contact: (202) 691-5902 • PressOffice@bls.gov

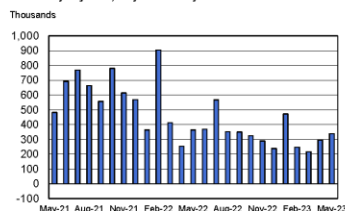
THE EMPLOYMENT SITUATION — MAY 2023

Total **nonfarm payroll employment** increased by 339,000 in May, and the **unemployment rate** rose by 0.3 percentage point to 3.7 percent, the U.S. Bureau of Labor Statistics reported today. Job gains occurred in professional and business services, government, health care, construction, transportation and warehousing, and social assistance.

Chart 1. Unemployment rate, seasonally adjusted, May 2021 – May 2023



Chart 2. Nonfarm payroll employment over-the-month change, seasonally adjusted, May 2021 – May 2023



This news release presents statistics from two monthly surveys. The household survey measures labor force status, including unemployment, by demographic characteristics. The establishment survey measures nonfarm employment, hours, and earnings by industry. For more information about the concepts and statistical methodology used in these two surveys, see the Technical Note.

Household Survey Data

The **unemployment rate** increased by 0.3 percentage point to 3.7 percent in May, and the number of **unemployed persons** rose by 440,000 to 6.1 million. The unemployment rate has ranged from 3.4 percent to 3.7 percent since March 2022. (See table A-1.)

New Jobs



Unemployment Rate



**Wages
(Annual Basis)**

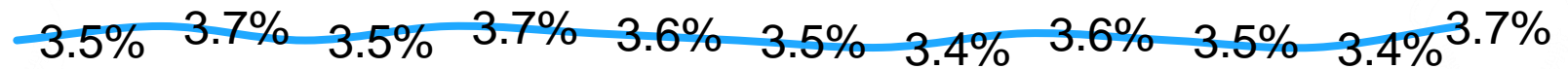




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National Unemployment Rates



July

Aug

Sept

Oct

Nov

Dec

Jan

Feb

March

April

May





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National Unemployment Rates



Pre-Covid	3.6%	3.6%	3.6%	3.5%
Now	3.6%	3.5%	3.4%	3.7%

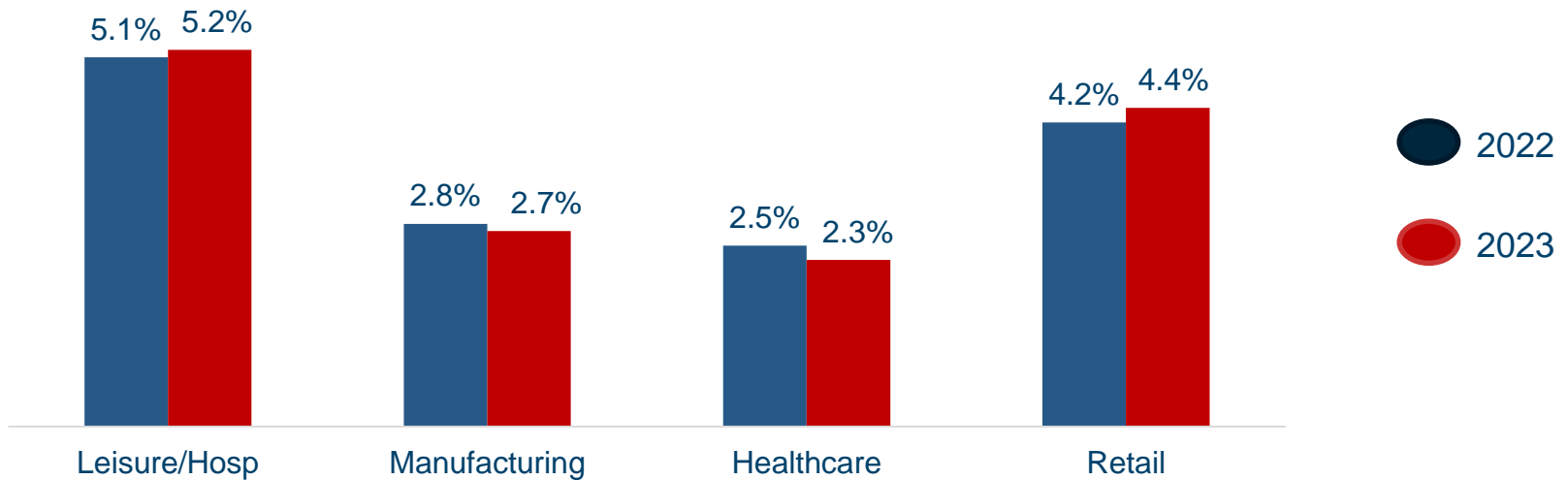




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National Unemployment Rates by Industry

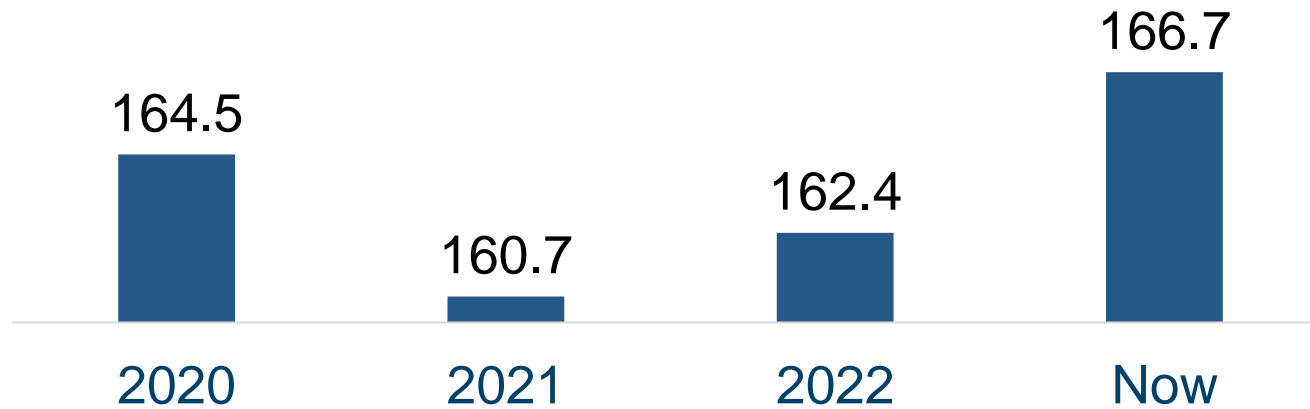




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US Labor Force



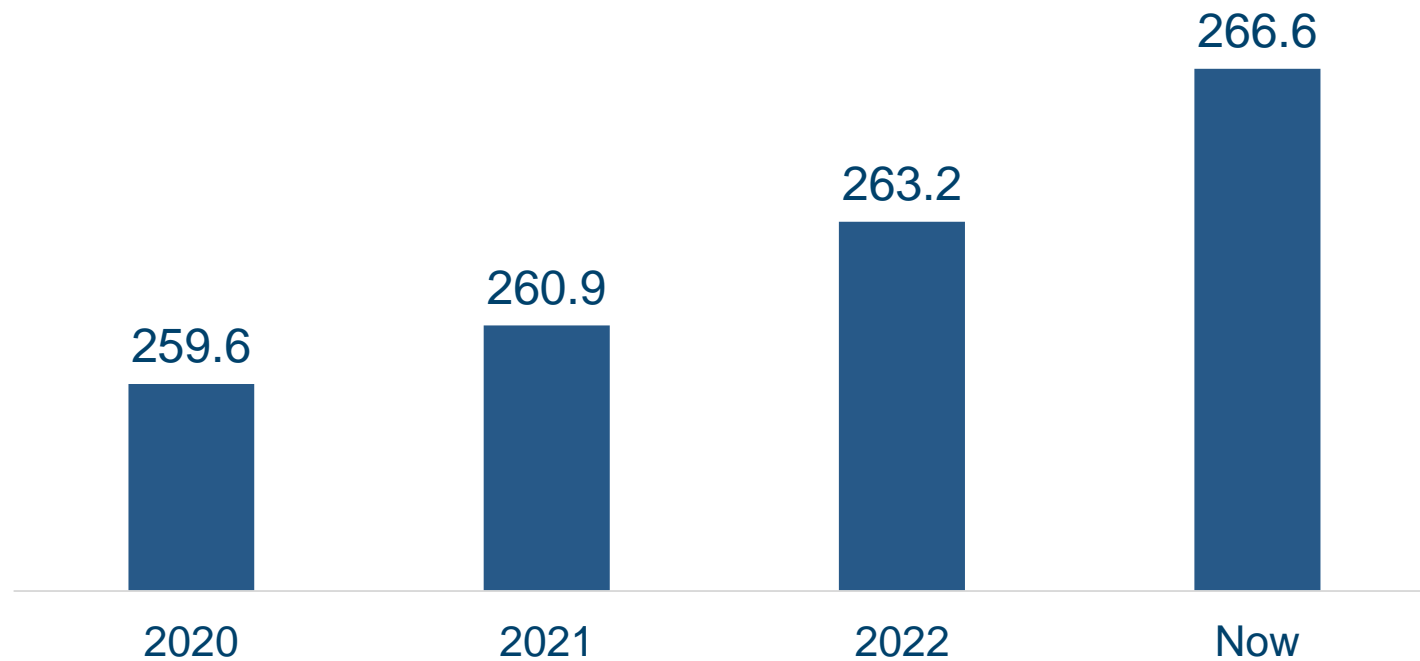


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US Population

Civilian noninstitutionalized population

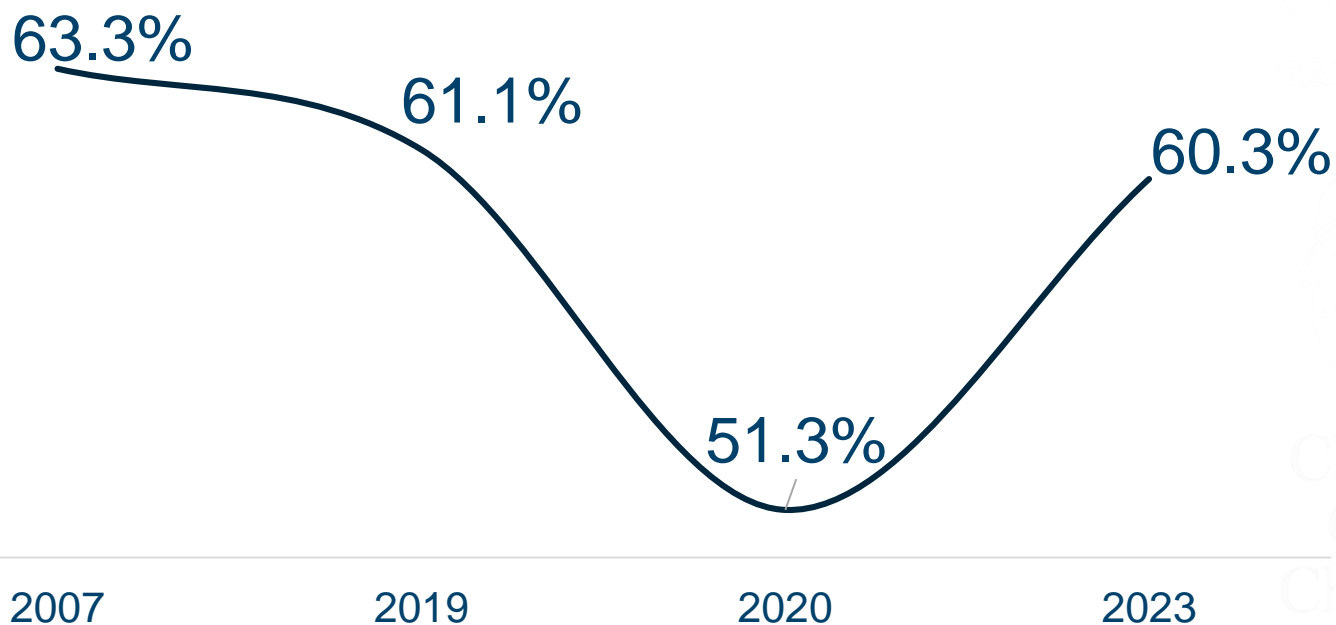




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Employment Population Ratio





Job Openings

Health care added 52,000 jobs in May, similar to the average monthly gain of 50,000 over the prior 12 months. In May, job growth occurred in ambulatory health care services (+24,000), hospitals (+20,000), and nursing and residential care facilities (-9,000).

Employment in **leisure and hospitality** continued to trend up in May (+48,000), largely in food services and drinking places (+33,000). Leisure and hospitality had added an average of 77,000 jobs per month over the prior 12 months. Employment in this industry remains below its February 2020 level by 349,000, or 2.1 percent.

In May, **construction** added 25,000 jobs, including 11,000 jobs in heavy and civil engineering construction. Over the prior 12 months, construction had added an average of 17,000 jobs per month.

Employment in **transportation and warehousing** increased by 24,000 in May. Transit and ground passenger transportation added 12,000 jobs, offsetting a decrease in the prior month. In May, employment also increased in couriers and messengers (-8,000) and air transportation (+3,000). Employment in transportation and warehousing has shown no clear trend in recent months.

In May, employment in **social assistance** rose by 22,000, in line with the average monthly gain of 23,000 over the prior 12 months. Over the month, individual and family services added 17,000 jobs.

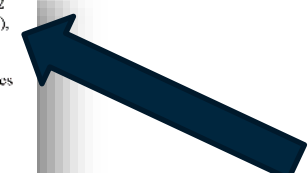
Employment was little changed over the month in other major industries, including **mining, quarrying, and oil and gas extraction; manufacturing; wholesale trade; retail trade; information; financial activities; and other services.**

In May, **average hourly earnings for all employees** on private nonfarm payrolls rose by 11 cents, or 0.3 percent, to \$33.44. Over the past 12 months, average hourly earnings have increased by 4.3 percent. In May, average hourly earnings of private-sector **production and nonsupervisory employees** rose by 13 cents, or 0.5 percent, to \$28.75. (See tables B-3 and B-8.)

The **average workweek for all employees** on private nonfarm payrolls edged down by 0.1 hour to 34.3 hours in May. In manufacturing, the average workweek was unchanged at 40.1 hours, and overtime edged up by 0.1 hour to 3.0 hours. The average workweek for **production and nonsupervisory employees** on private nonfarm payrolls remained at 33.8 hours. (See tables B-2 and B-7.)

The change in total nonfarm payroll employment for March was revised up by 52,000, from +165,000 to +217,000, and the change for April was revised up by 41,000, from +253,000 to +294,000. With these revisions, employment in March and April combined is 93,000 higher than previously reported. (Monthly revisions result from additional reports received from businesses and government agencies since the last published estimates and from the recalculation of seasonal factors.)

The Employment Situation for June is scheduled to be released on Friday, July 7, 2023, at 8:30 a.m. (ET).



Healthcare added 52,000 jobs in May (the most of any industry)

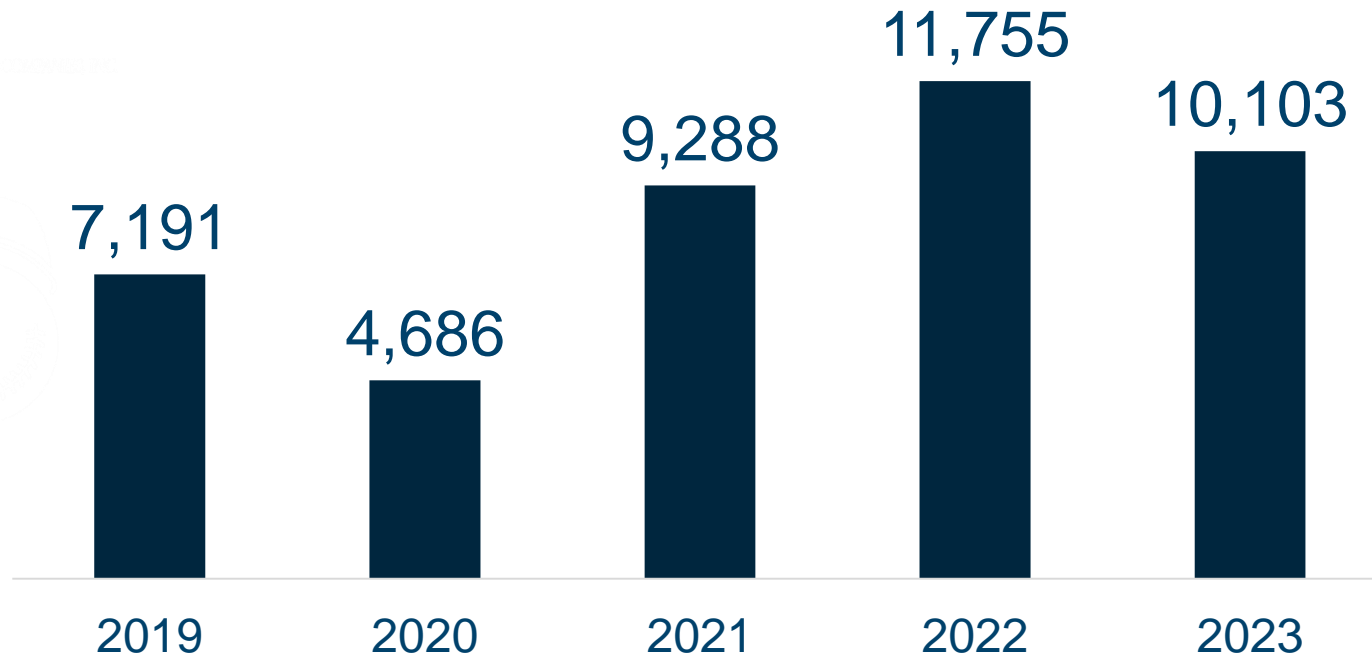


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Job Openings

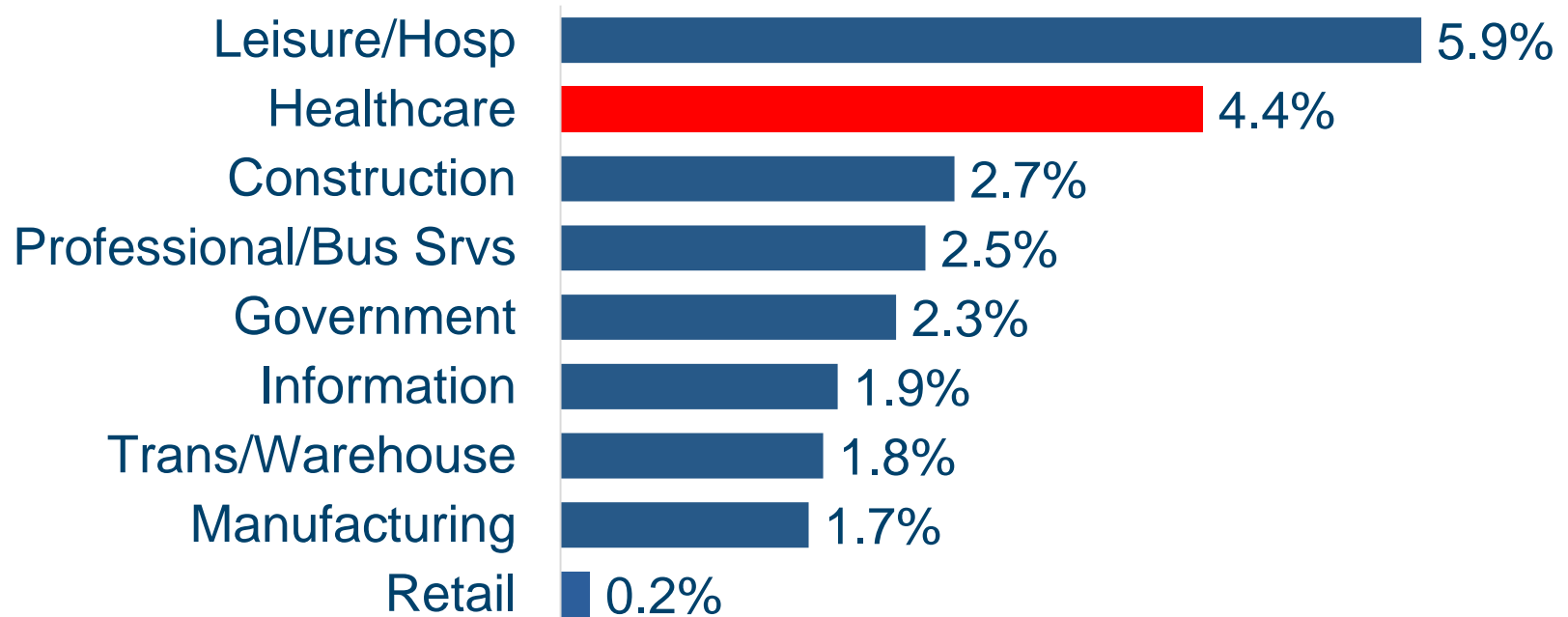
(Thousands)





Employment Growth by Industry

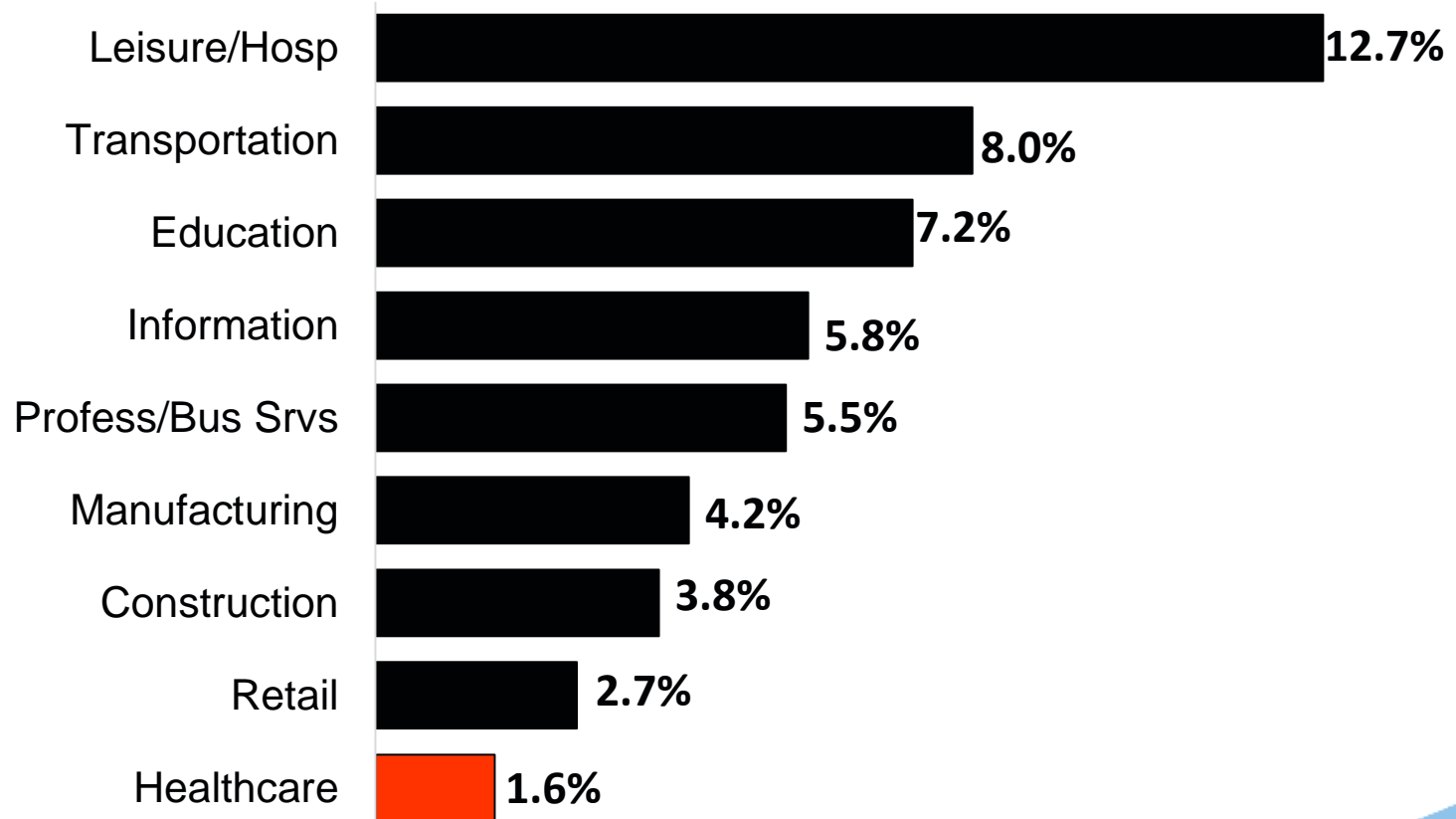
Past 12 Months





Employment Growth by Industry

Last Year

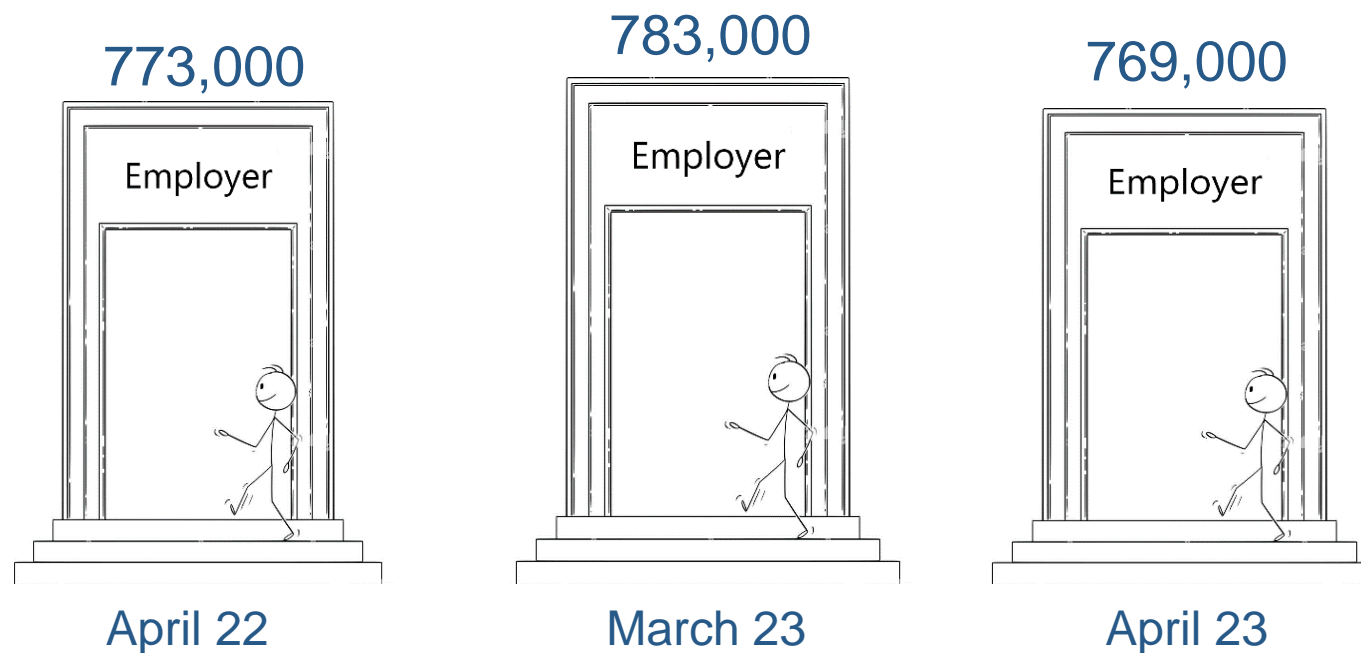




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Hiring in Healthcare



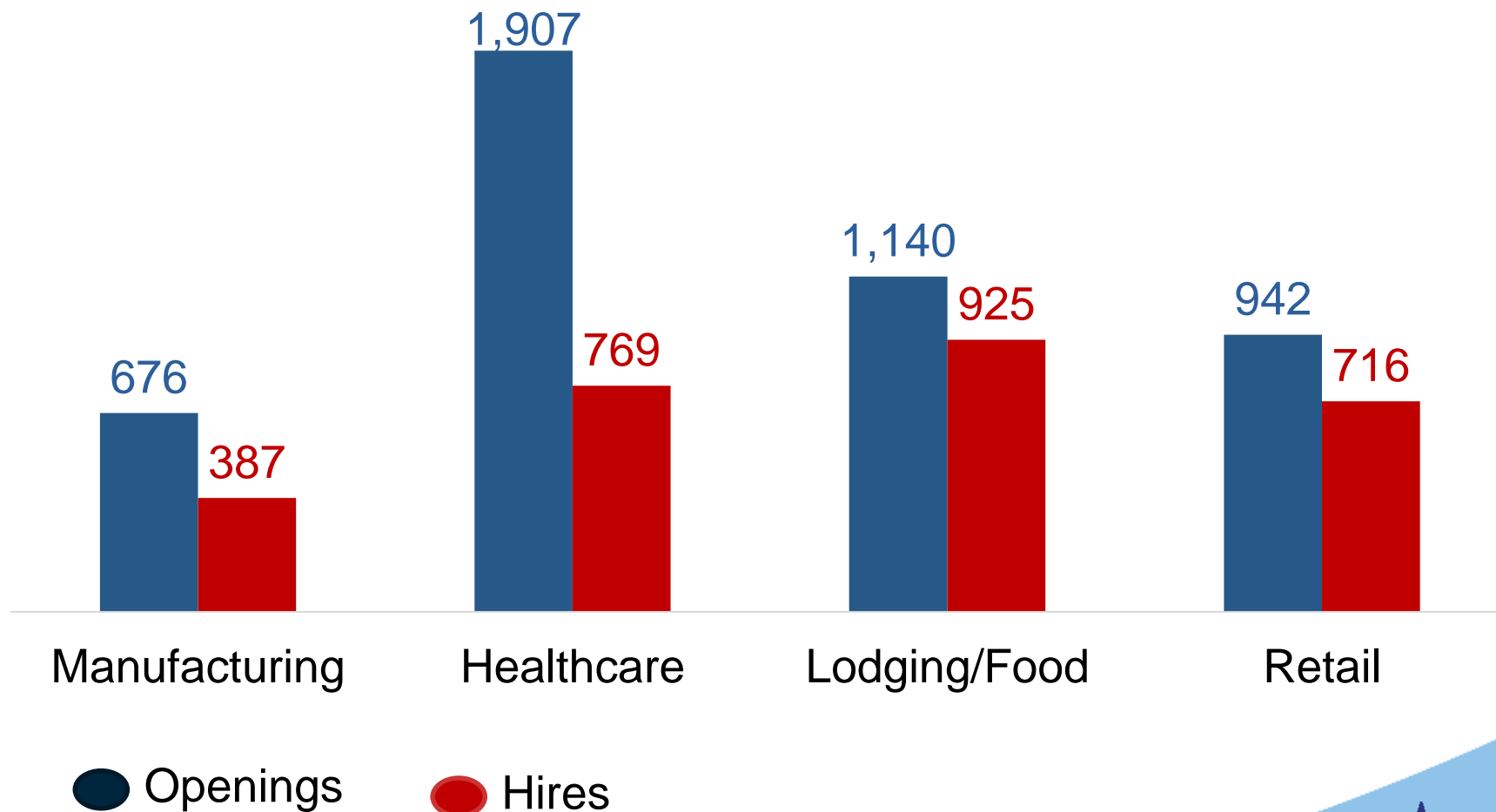


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Job Openings/Hiring by Industry

Thousands





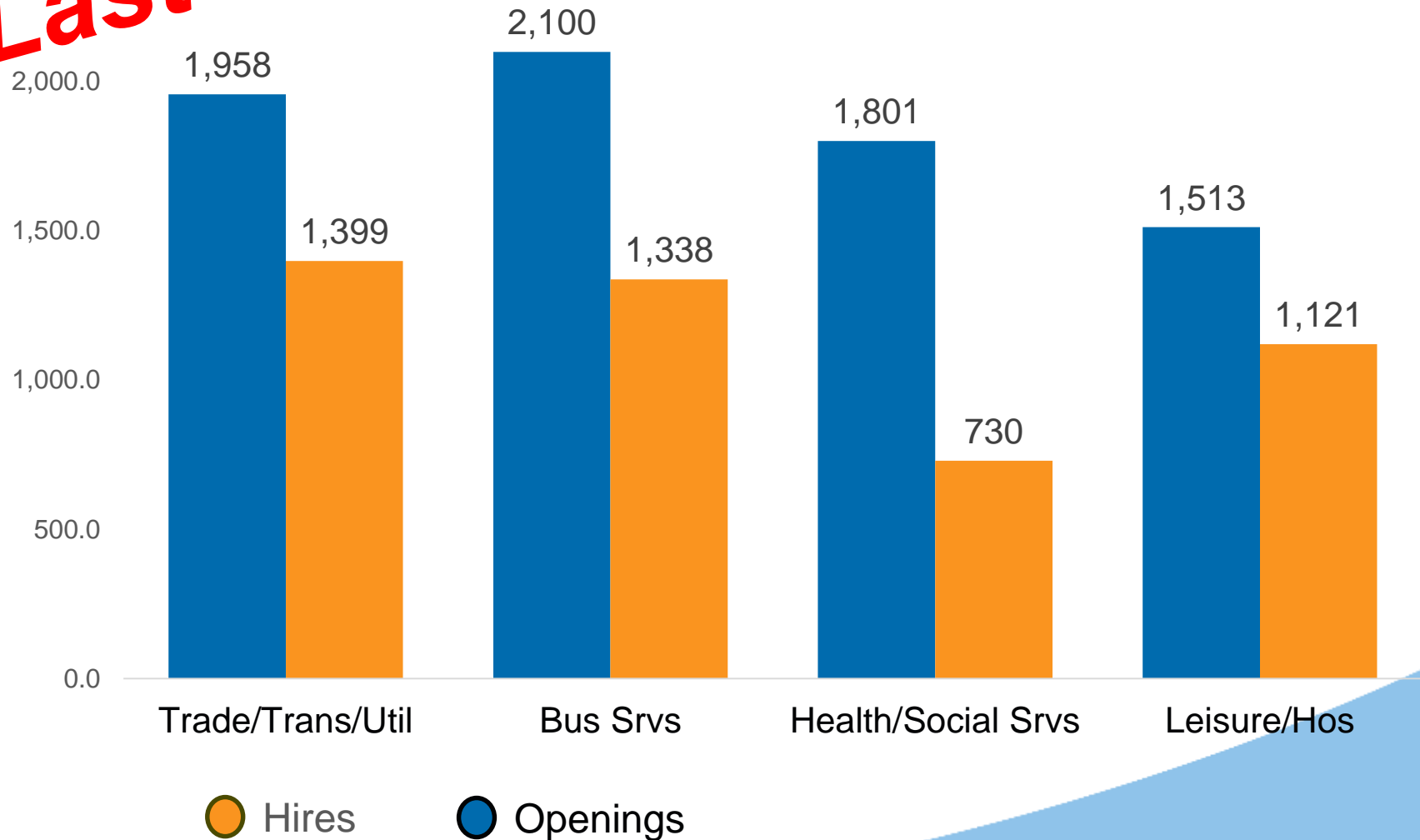
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Industry Job Openings and Hires

Thousands

Last Year



of Quits Per Month



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4.6 Million

3.8 Million

3.4 Million

2.8 Million

Feb 2020

April 2022

March 2023

April 2023

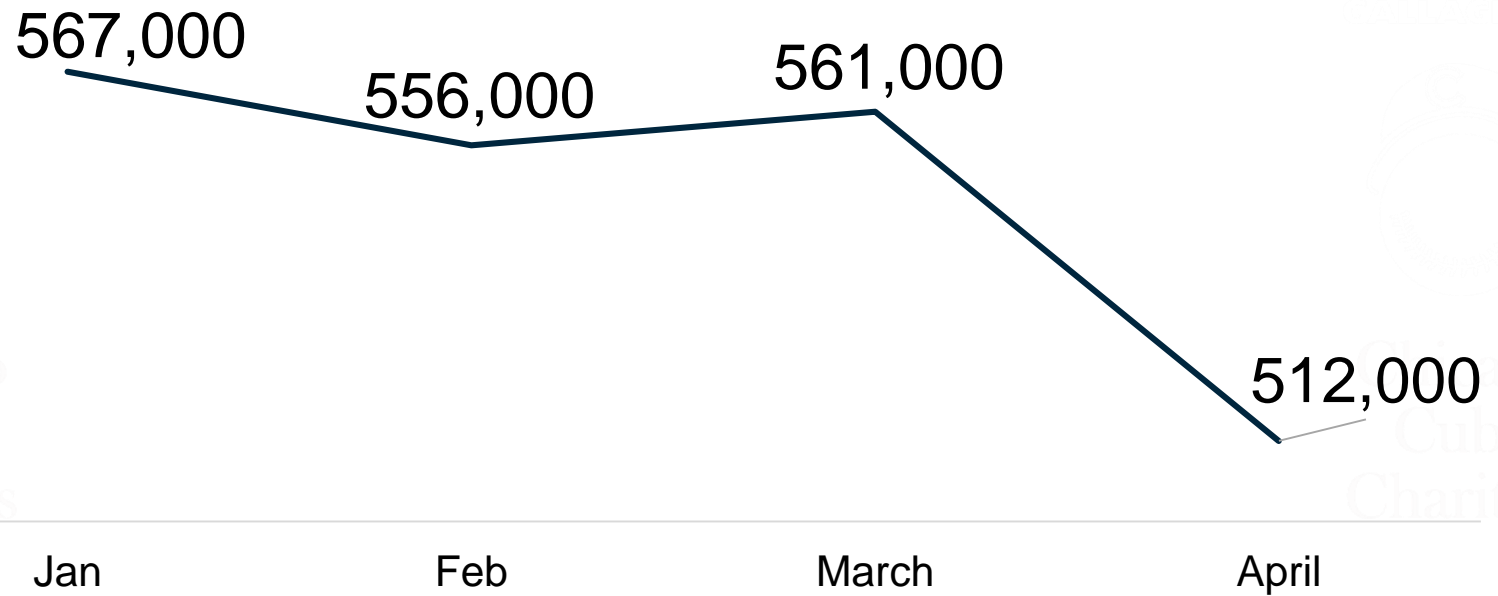


Healthcare Quits



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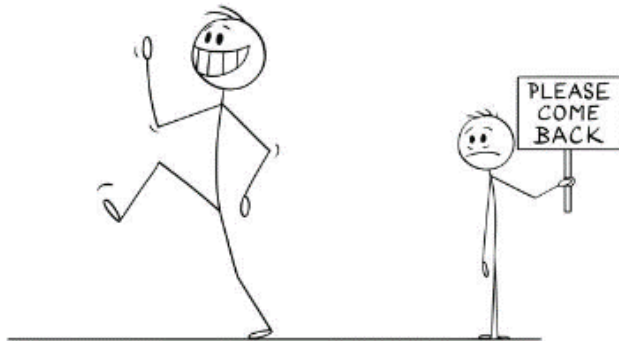


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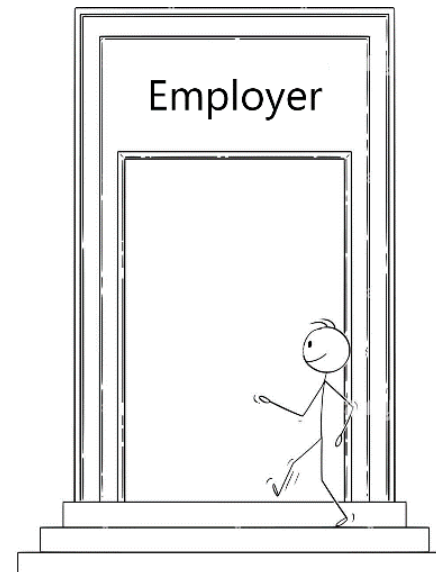
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Healthcare Hiring and Quits

512,000



769,000



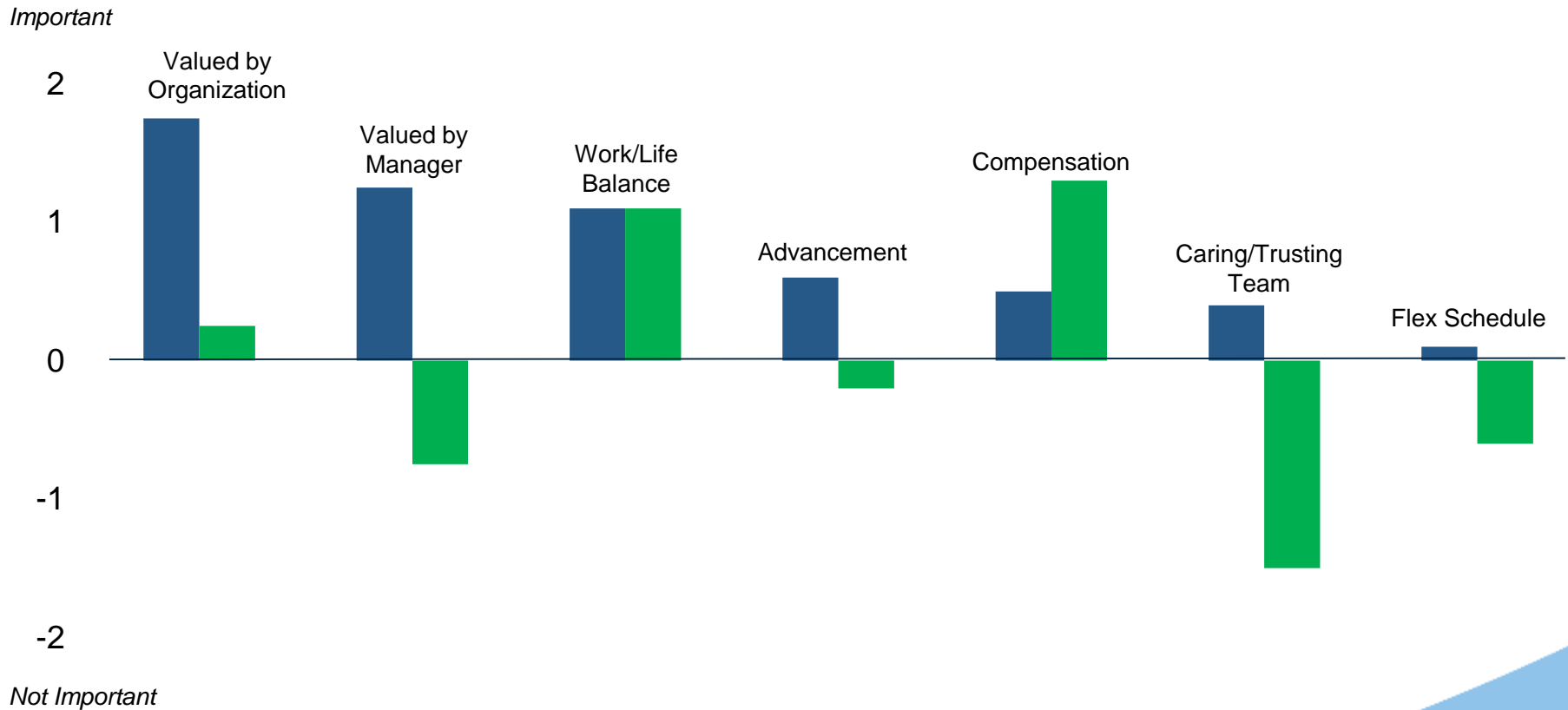


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Why Employees Leave

● Employees ● Employers



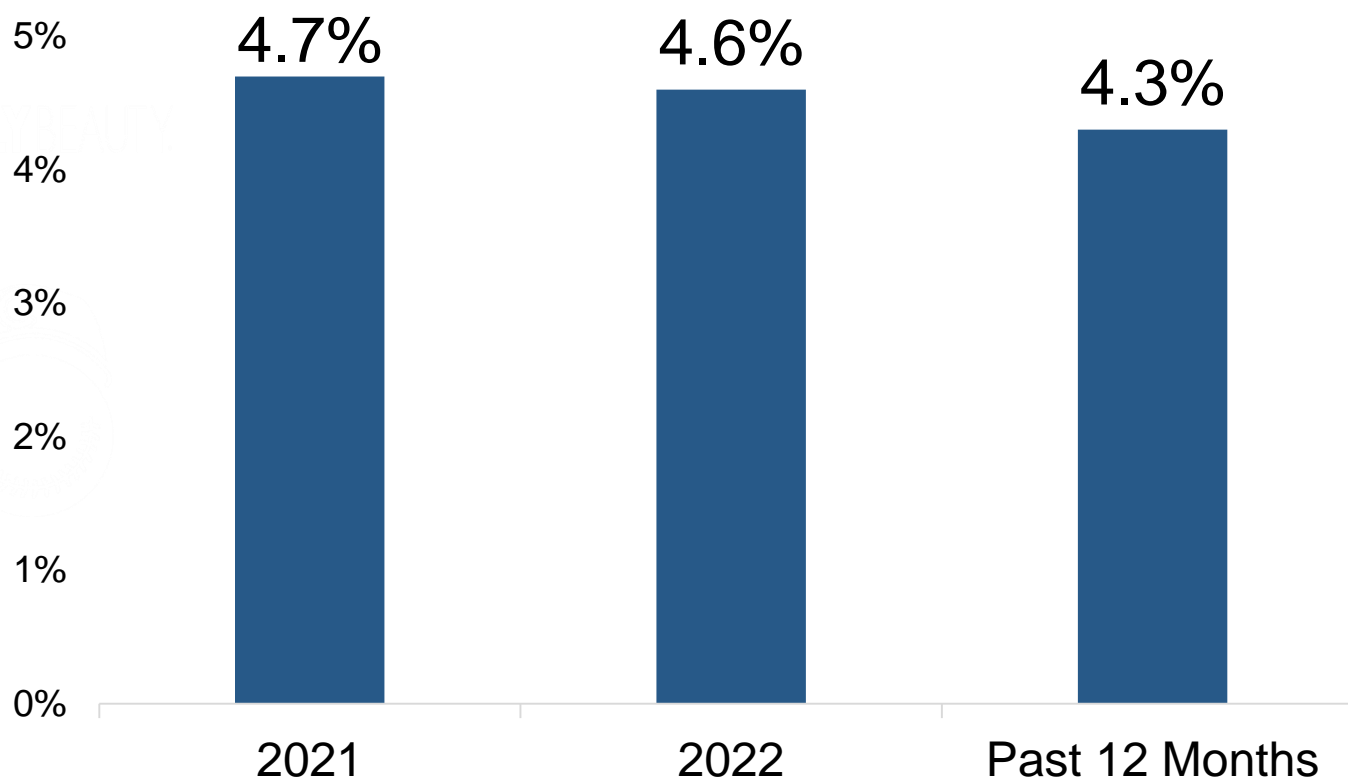


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Annual Wage Growth

National





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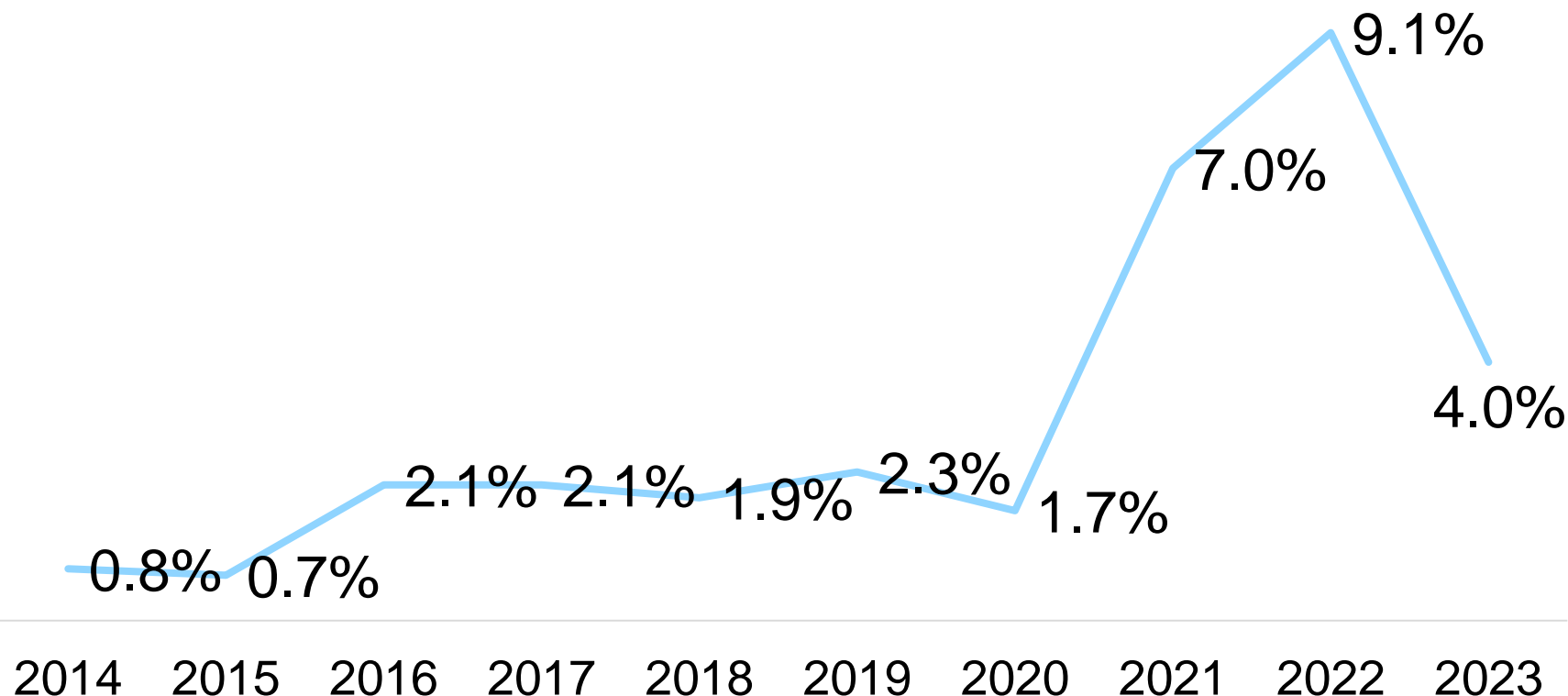
Annual Wage Growth by Industry

National





Inflation



Lowest inflation rate since March 2021



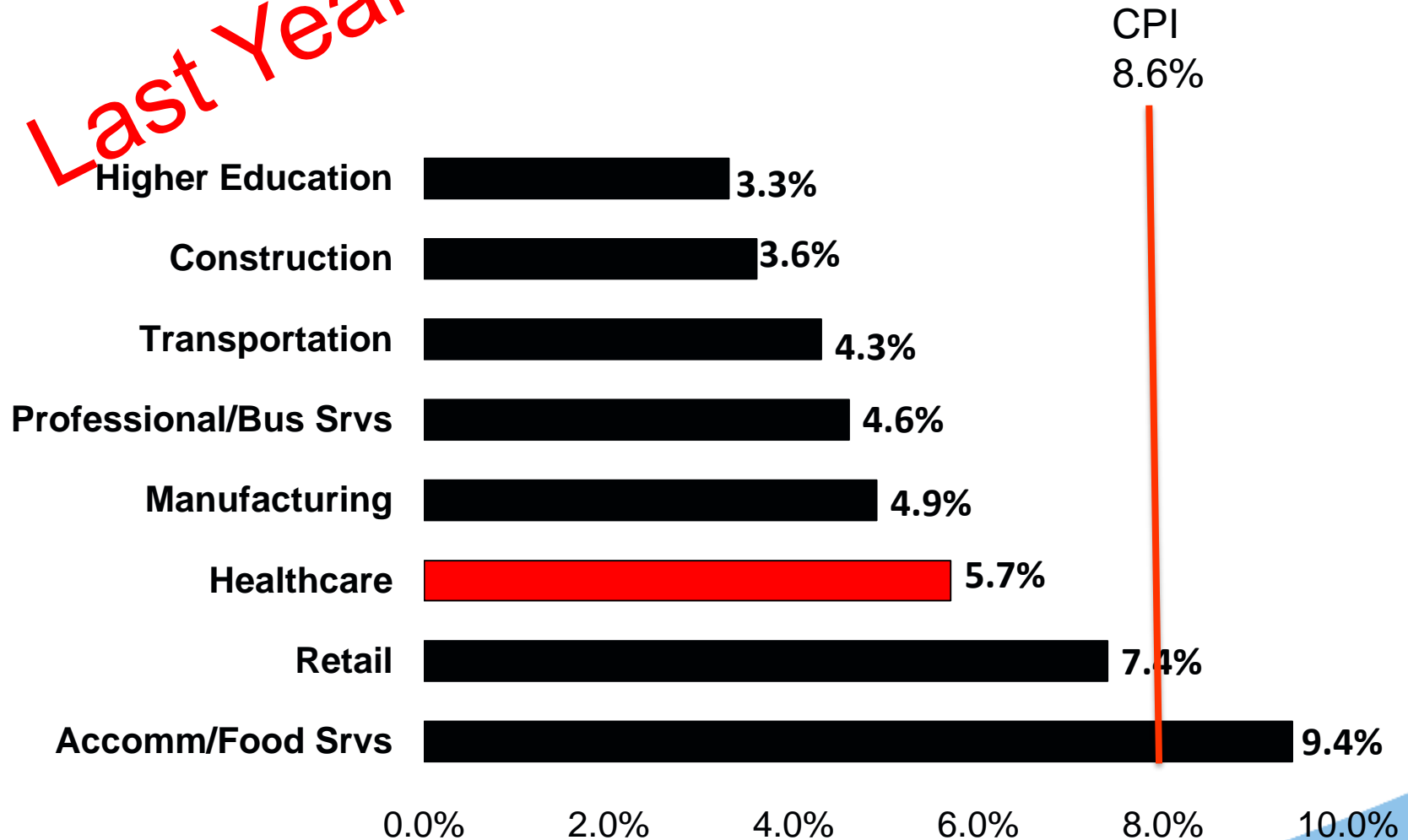


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Wage Growth vs. Inflation

Last Year



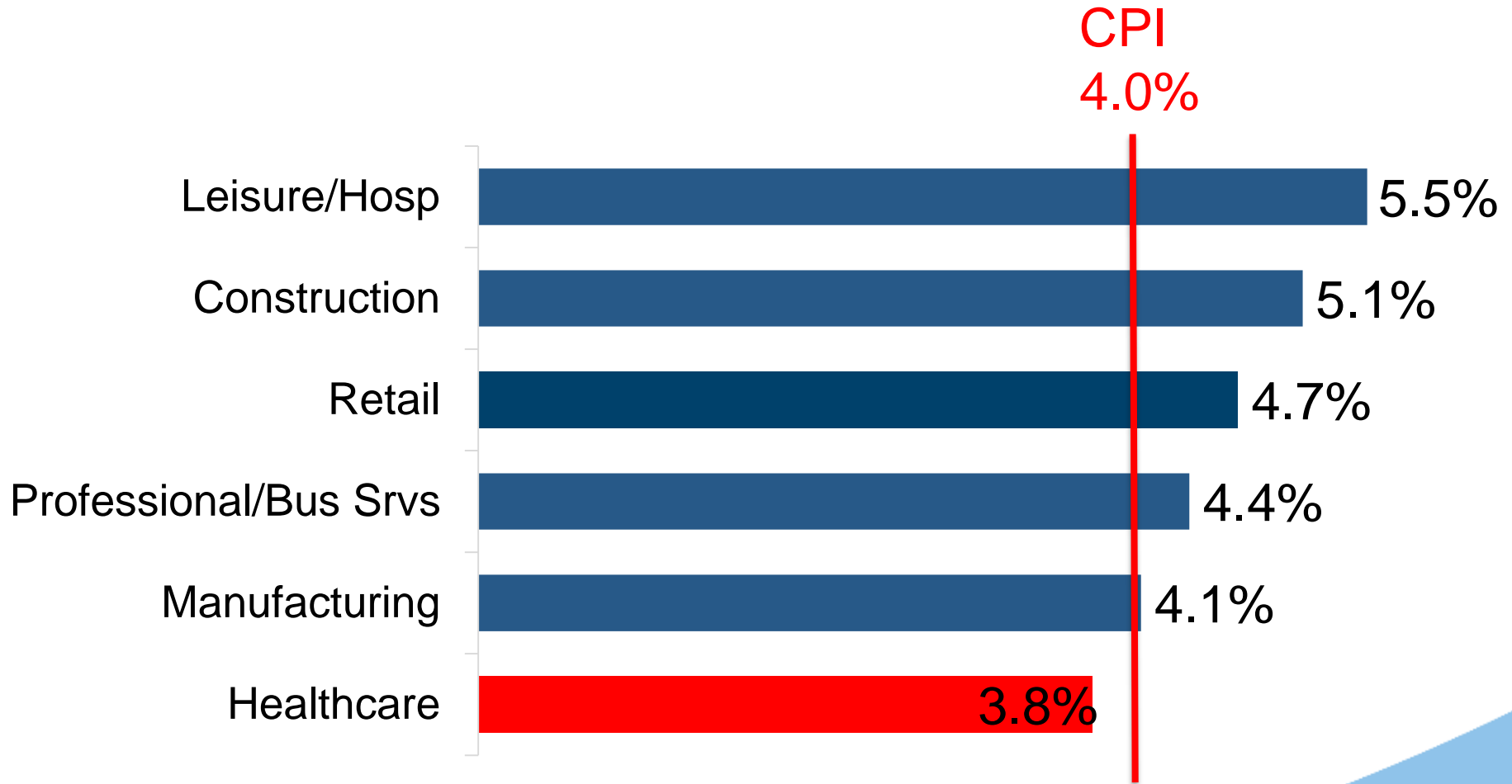


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Annual Wage Growth by Industry

National



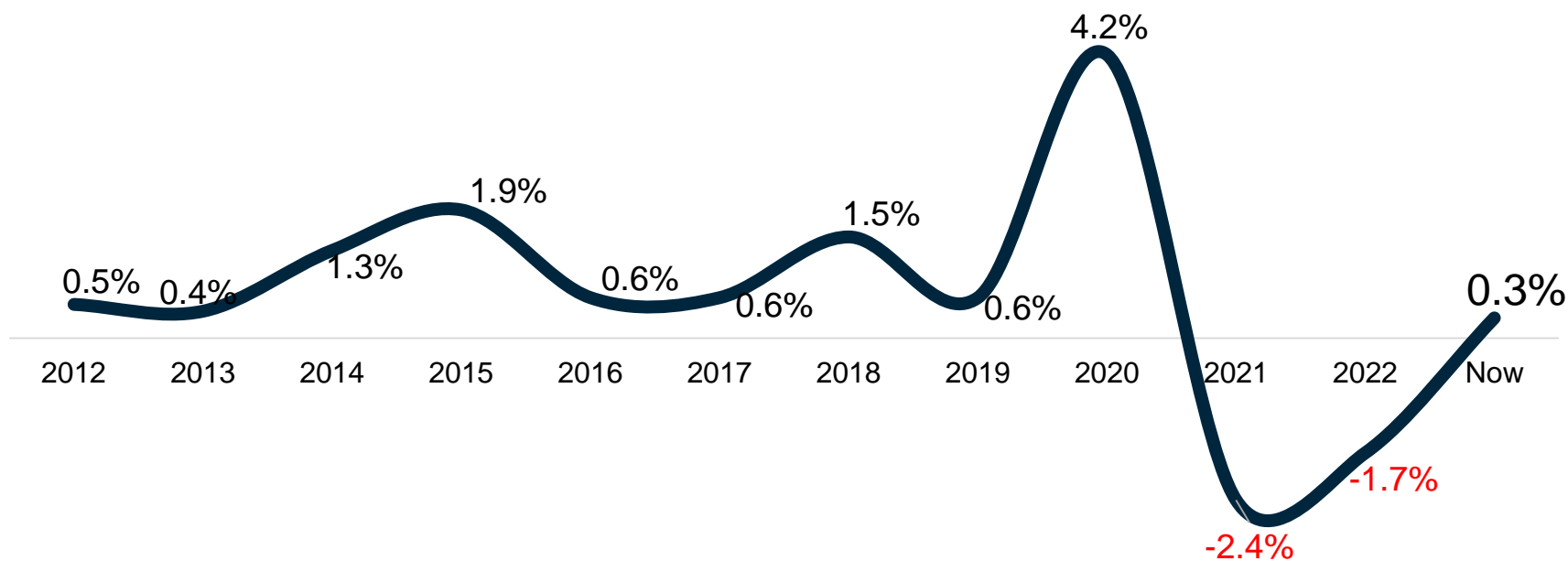


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Real Wage Growth

National





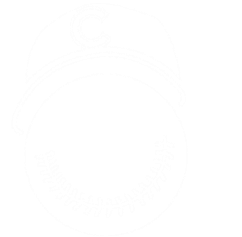
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2023 Survey Results and Trends

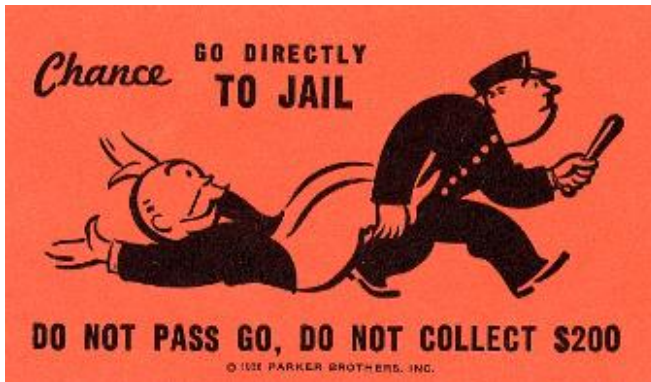


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Federal Trade Commission Department of Justice Compensation Survey Guidelines

- Competitors are NOT allowed to share un-aggregated compensation information
 - (Don't call each other for data!)*
- Properly conducted surveys are permissible
- Guidelines for compensation surveys –
 - **All results must be aggregated**
 - **At least 5 participants required in each calculated statistic**
 - **No individual organization's data can represent more than 25% on a weighted basis of that statistic**
 - **Data must be at least 90 days old at the time of publication**
 - **Survey must be compiled by a third party**



Federal Trade Commission Department of Justice Compensation Survey Guidelines

WITHDRAW



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2023 Compensation and Benefits Survey



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Survey Highlights

- Data effective March 1, 2023
- 47 Organizations
- 47 Positions
- Perfect Symmetry



Survey Highlights

- Compensation Data
 - 5 data cuts per title
 - All Participants
 - Organization size by Operating Expense
 - < \$7.5 Million, \$7.5 to \$15 Million, > \$15 Million
 - Organization size by FTEs
 - <100, 100 to 200, >200
 - Geographic Regions
 - North Central, East, Central, South, West
 - Years of Experience (# of years with the organization)
 - <1, 1 to 3, 3 to 5, >5

Data Cuts
by FTE
Updated



Survey Highlights

- Compensation Data
 - 5 data cuts per title
 - All Participants
 - Organization size by Operating Expense
 - < \$7.5 Million, \$7.5 to \$15 Million, > \$15 Million
 - Organization size by FTEs
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 - Geographic Regions
 - North Central, East, Central, South, West
 - Years of Experience (# of years with the organization)
 - <1, 1 to 3, 3 to 5, >5

Data Cuts
by FTE
Updated



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Survey Highlights

- Benefits Data
 - Healthcare Benefits
 - Pharmacy / RX Coverage
 - Dental Benefits
 - Retirement
 - Paid Leave
 - Wellness Programs
 - Continuing Medical Education
 - Tuition Reimbursement
 - Miscellaneous Benefits



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Survey Highlights

- Recruitment/Workforce
 - Recruitment
 - Loan Repayment Programs
 - Bonus Programs
 - Relocation Benefits
 - Turnover Data

**Texas Association of Community Health Centers
2023 Compensation and Benefits Survey**

Survey Title: Dental Director

Job Number: 2

Core Duties: Responsible for all dental services, and overseeing all aspects of dental care delivery at all dental clinic sites including planning, budgeting/resource allocation, growth and development, regulatory compliance, quality, efficiency and the supervision of dental supervisors, dentists, and dental hygienist staff. Facilitates communication with local oral health community. Position includes clinical and administrative responsibilities. Typically a member of the senior management and/or executive team. Alternative Titles: Chief Dental Officer, Oral Health Director. Supervisory Responsibility: Yes. Budget Responsibility: Yes.

Qualifications: Graduate of an accredited dental school with a Doctor of Dental Surgery (DDS) or Doctor of Dental Medicine (DMD) degree; 2-3 years' experience; Unrestricted license from the Texas Board of Dental Examiners; Annual continuing education as required by the Texas Board of Dental Examiners; Registered and have current DEA (prescriptive authority); Current Cardiopulmonary Resuscitation (CPR) for Healthcare Professionals Certification

Data Type	#	Base Compensation				Short-term Incentive			Total Cash	Formal Salary Range		
		25th	50th	Average	75th	Elig %	STI Avg	Target %	Average	Minimum	Midpoint	Maximum
Overall												
<i>All Participants</i>												
Organization	27	\$154,669	\$173,451	\$176,455	\$196,294	21.7%	***	***	\$176,455	\$137,591	\$198,075	\$204,497
Incumbent	29	\$154,096	\$173,451	\$174,746	\$194,147				\$176,366			
Operating Budget												
<i>Under \$10 Million</i>												
Organization	8	\$144,837	\$157,774	\$158,747	\$182,506	***	***	***	\$158,747	\$139,181	\$236,152	\$168,468
Incumbent	9	\$127,300	\$155,547	\$152,190	\$182,506				\$152,190			
<i>\$10 to \$20 Million</i>												
Organization	8	\$163,200	\$176,548	\$181,323	\$197,803	14.3%	***	***	\$181,323	***	***	***
Incumbent	9	\$163,200	\$173,606	\$183,799	\$207,200				\$183,799			
<i>Over \$20 Million</i>												
Organization	11	\$153,523	\$178,500	\$185,793	\$229,197	44.4%	***	***	\$185,793	\$141,975	\$188,515	\$231,816
Incumbent	11	\$153,523	\$178,500	\$185,793	\$229,197				\$190,065			

**Texas Association of Community Health Centers
2023 Compensation and Benefits Survey**

Survey Title: Dental Director

Job Number: 2

Data Type	#	Base Compensation				Short-term Incentive			Total Cash Average	Formal Salary Range			
		25th	50th	Average	75th	Elig %	STI Avg	Target %		Minimum	Midpoint	Maximum	
FTEs													
<i>Under 100</i>													
Organization	8	\$144,837	\$157,774	\$155,428	\$174,231	***	***	***	\$155,428	***	***	***	
Incumbent	9	\$127,300	\$155,547	\$149,240	\$174,231				\$149,240				
<i>100 to 200</i>													
Organization	8	\$169,250	\$185,823	\$186,154	\$201,803	33.3%	***	***	\$186,154	***	***	***	
Incumbent	9	\$166,803	\$179,646	\$188,093	\$211,200				\$188,093				
<i>Over 200</i>													
Organization	11	\$153,523	\$166,400	\$184,693	\$229,197	33.3%	***	***	\$184,693	\$142,975	\$187,286	\$226,216	
Incumbent	11	\$153,523	\$166,400	\$184,693	\$229,197				\$188,965				
Years of Experience													
<i>Less than 1</i>													
Organization	2	***	***	***	***	***	***	***	***	***	***	***	
Incumbent	2	***	***	***	***				***				
<i>1 to 3</i>													
Organization	5	\$156,505	\$175,011	\$184,356	\$216,879	***	***	***	\$184,356	***	***	***	
Incumbent	5	\$156,505	\$175,011	\$184,356	\$216,879				\$187,356				
<i>3 to 5</i>													
Organization	5	\$107,440	\$153,523	\$156,888	\$208,018	***	***	***	\$156,888	***	***	***	
Incumbent	5	\$107,440	\$153,523	\$156,888	\$208,018				\$156,888				
<i>Greater than 5</i>													
Organization	15	\$154,674	\$173,451	\$177,278	\$196,294	26.7%	***	***	\$177,278	\$133,601	\$171,815	\$213,276	
Incumbent	16	\$157,337	\$173,529	\$178,923	\$194,147				\$180,923				

Sample Page



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Texas Association of Community Health Centers 2023 Compensation and Benefits Survey

Survey Title: Dental Director

Job Number: 2

Data Type	#	Base Compensation				Short-term Incentive			Total Cash Average	Formal Salary Range			
		25th	50th	Average	75th	Elig %	STI Avg	Target %		Minimum	Midpoint	Maximum	
<i>State Region</i>													
<i>North Central</i>													
Organization	3	***	***	***	***	***	***	***	***	***	***	***	***
Incumbent	3	***	***	***	***				***				
<i>East</i>													
Organization	6	\$126,632	\$174,231	\$165,889	\$196,803	***	***	***	\$165,889	***	***	***	
Incumbent	8	\$136,562	\$173,529	\$162,335	\$182,506				\$162,335				
<i>Central</i>													
Organization	5	\$176,620	\$200,000	\$207,400	\$241,879	***	***	***	\$207,400	***	***	***	
Incumbent	5	\$176,620	\$200,000	\$207,400	\$241,879				\$207,800				
<i>South</i>													
Organization	8	\$150,005	\$153,877	\$164,625	\$175,921	28.6%	***	***	\$164,625	\$138,840	\$173,037	\$207,693	
Incumbent	8	\$150,005	\$153,877	\$164,625	\$175,921				\$170,250				
<i>West</i>													
Organization	5	\$160,000	\$160,930	\$170,286	\$185,250	40.0%	***	***	\$170,286	***	***	***	
Incumbent	5	\$160,000	\$160,930	\$170,286	\$185,250				\$170,286				



Survey Format

- Two sets of statistics presented for each position
 - Organization percentiles represent the distribution of organization’s average pay
 - Incumbent percentiles represent the distribution of the salary of each individual in the survey

Data Type	#	Base Compensation			
		25th	50th	Average	75th
Organization	42	\$217,240	\$248,806	\$254,747	\$290,365
Incumbent	43	\$212,000	\$247,612	\$253,284	\$287,481



Survey Format

	Incumbent Data					Clinic Average
Clinic A	\$14.22	\$15.78	\$16.25	\$16.75	\$17.40	\$16.08
Clinic B	\$14.47	\$14.45	\$15.99	\$17.22	\$18.02	\$16.03
Clinic C	\$14.75	\$15.10	\$16.03	\$16.77	\$17.36	\$16.00
Clinic D	\$13.99	\$14.79	\$16.50	\$17.22	\$18.09	\$16.12
Clinic E	\$14.90	\$15.69	\$15.48	\$16.56	\$17.21	\$15.97



Survey Format

Incumbent Data

Clinic A	\$14.22	\$15.78	\$16.25	\$16.75	\$17.40
Clinic B	\$14.47	\$14.45	\$15.99	\$17.22	\$18.02
Clinic C	\$14.75	\$15.10	\$16.03	\$16.77	\$17.36
Clinic D	\$13.99	\$14.79	\$16.50	\$17.22	\$18.09
Clinic E	\$14.90	\$15.69	\$15.48	\$16.56	\$17.21

Clinic Average

\$16.08
\$16.03
\$16.00
\$16.12
\$15.97

25th Median Average 75th

Interquartile Range

Organization	\$16.00	\$16.03	\$16.04	\$16.08
Incumbent	\$14.90	\$16.03	\$16.04	\$17.21

\$0.08
\$2.31

Individual Clinic Report



Individual Clinic Report

Survey Title: Nurse Practitioner

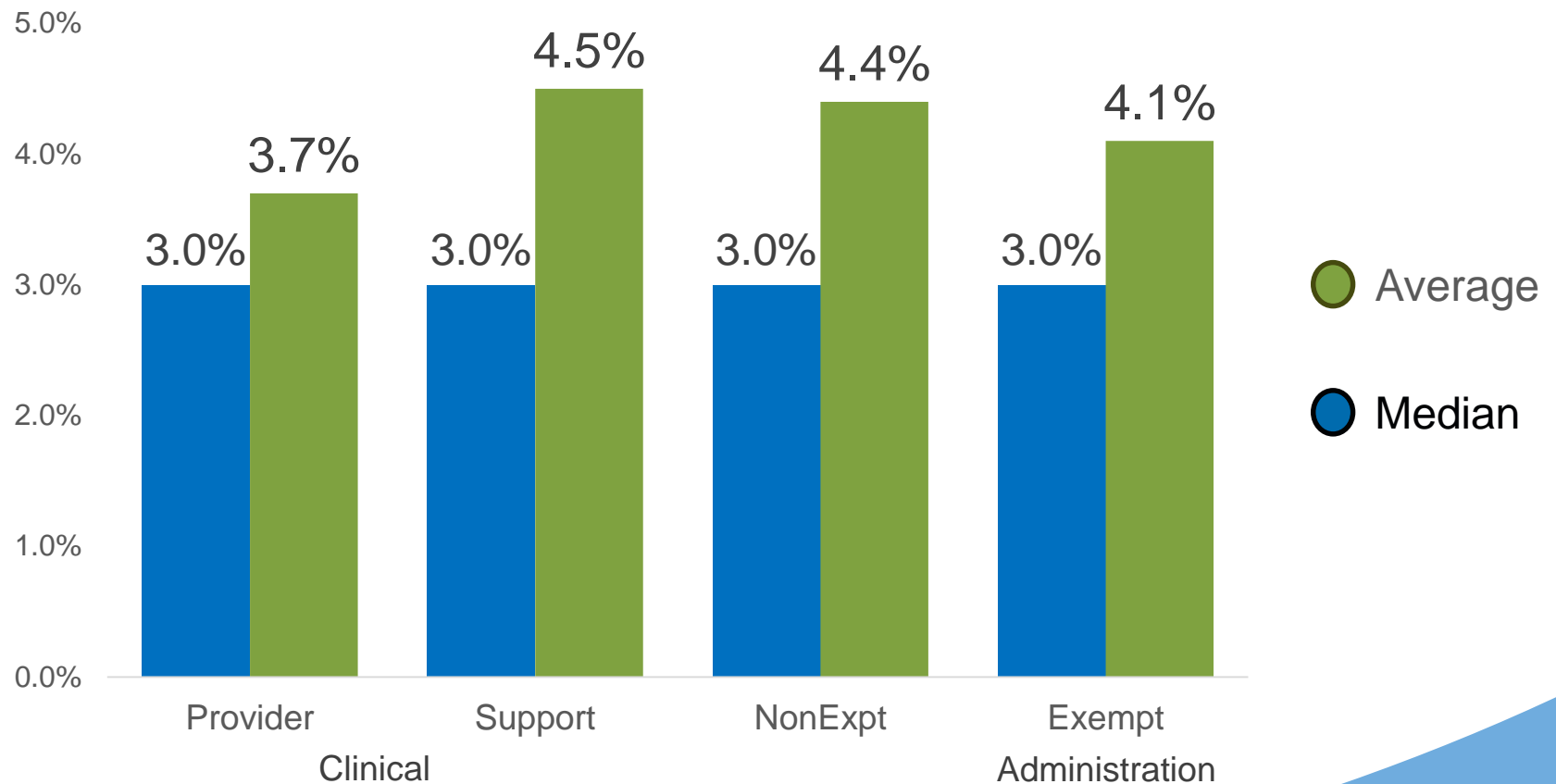
Job Number: 15

	# Orgs	# Inc	Base Compensation				Short-term Incentive			Formal Salary Range		
			25th	50th	Average	75th	Elig %	STI Avg	Target %	Minimum	Midpoint	Maximum
<i>All Participants</i>	52	404	\$102,441	\$109,643	\$110,112	\$114,472	34.8%	\$2,667	7%	\$91,570	\$107,328	\$125,892
<i>Your Data vs All Participants</i>					0.7%					1.9%	9.5%	14.8%
<i>\$7.5 to \$12.5 Million</i>	10	64	\$106,440	\$111,308	\$111,026	\$115,753	12.5%	***	***	\$91,267	\$104,972	\$124,526
<i>Your Data vs Operating Budget Group</i>					-0.1%					2.2%	12.0%	16.1%
<i>75 to 150 FTEs</i>	15	94	\$102,919	\$110,177	\$109,045	\$114,564	38.5%	***	***	\$90,016	\$104,757	\$124,232
<i>Your Clinic vs FTE Group</i>					1.7%					3.6%	12.2%	16.4%
<i>East</i>	15	118	\$105,116	\$110,721	\$110,216	\$112,972	57.1%	\$756	***	\$92,667	\$109,028	\$130,129
<i>Your Clinic vs Your Region Group</i>					0.6%					0.7%	7.8%	11.1%
Your Clinic's Data		1			\$110,880			N		\$93,282	\$117,535	\$144,568



Salary Increases granted by Organizations

FY 2023 Total Increase Granted





Salary Growth

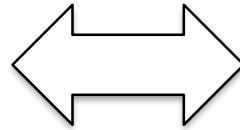


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Comparing this year's survey to last year



2022 Compensation Survey



2023 Compensation Survey

All Positions Growth

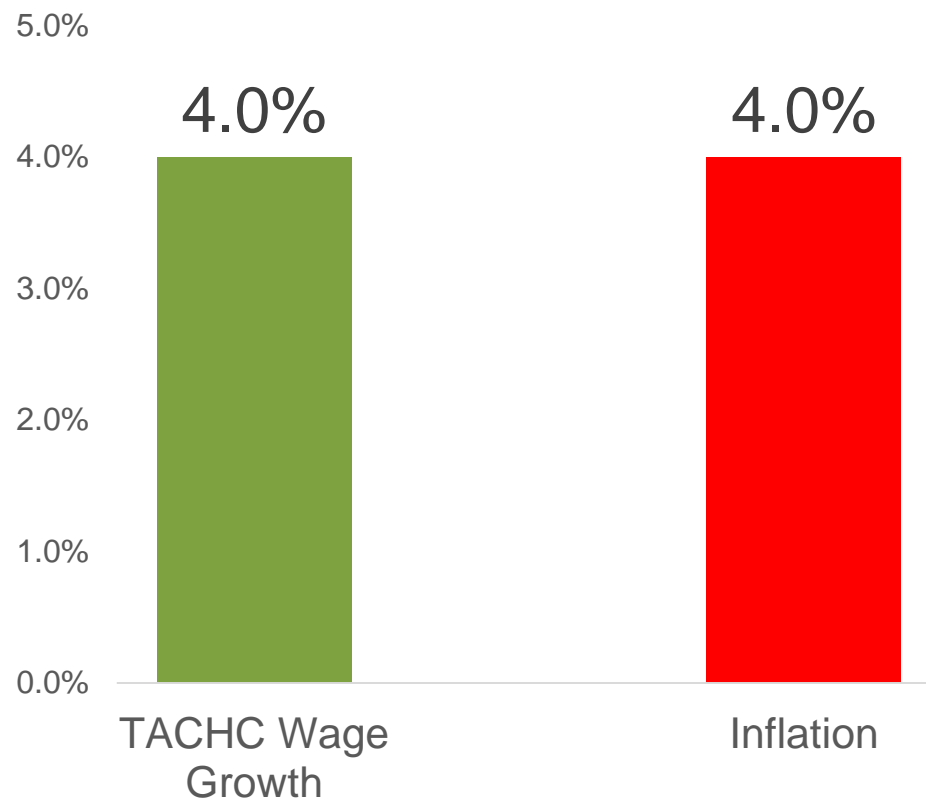
4.0%



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TACHC Wage Growth vs. Inflation (CPI)





Salary Growth



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Largest Yr. to Yr. Growth

Title	% change
Manager of Human Resources	17.2%
Coding Specialist	14.8%
Radiology Tech	12.9%
Executive Assistant	9.8%
LCSW	8.8%
Accountant	8.1%
Psychologist	7.5%
Dentist	7.1%
Lab Technician	6.9%
Registered Nurse	6.7%



Salary Growth



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Radiologic Technician

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$48,583	\$54,861	12.9%



Pharmacist

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$134,165	\$143,023	8.1%



Salary Growth



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Accountant

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$58,933	\$63,721	8.1%



Dir. of Information Technology

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$99,492	\$102,863	3.4%



Salary Growth



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Physician Assistant

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$118,270	\$120,919	2.2%



Registered Nurse

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$64,895	\$69,238	6.7%



Salary Growth



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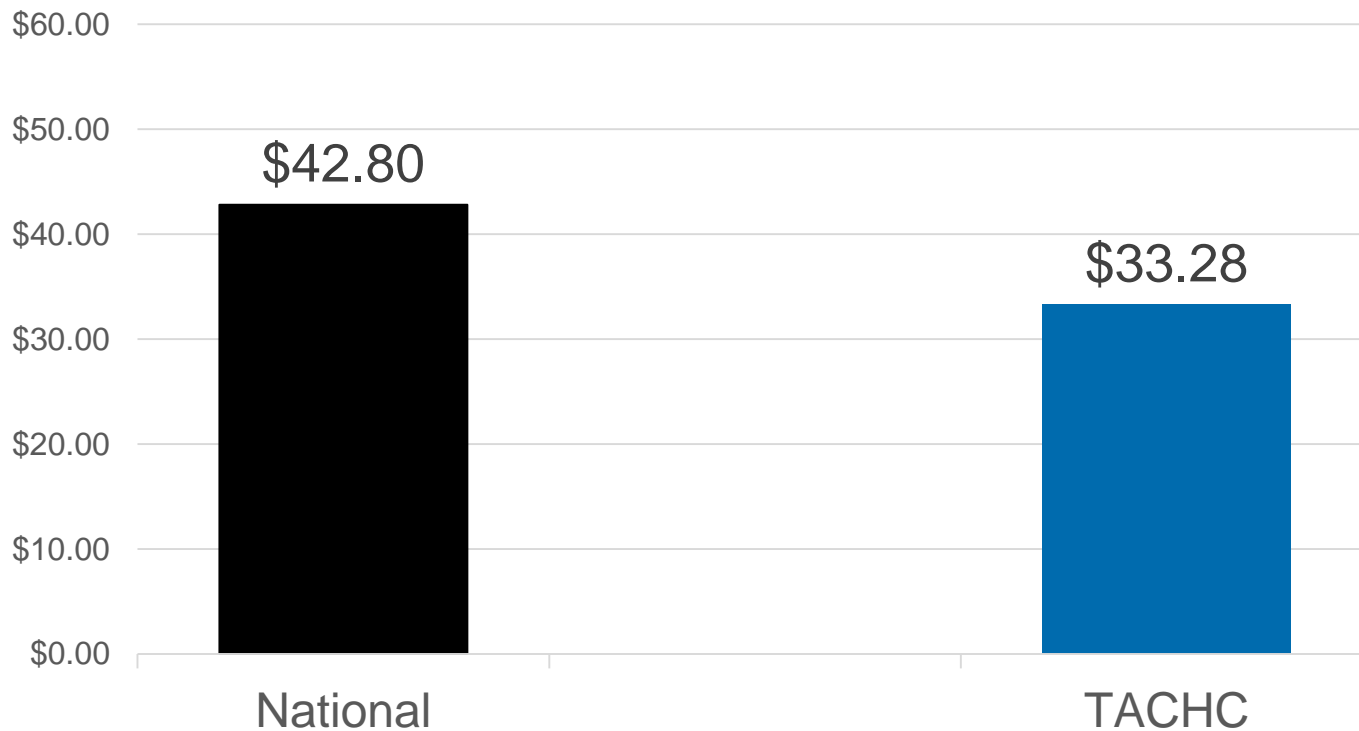
Executive Director/CEO

2022 Avg. Rate	2023 Avg. Rate	YR to YR Growth
\$204,345	\$211,990	3.7%



Staff Salary Growth

Average Hourly Rate - RN

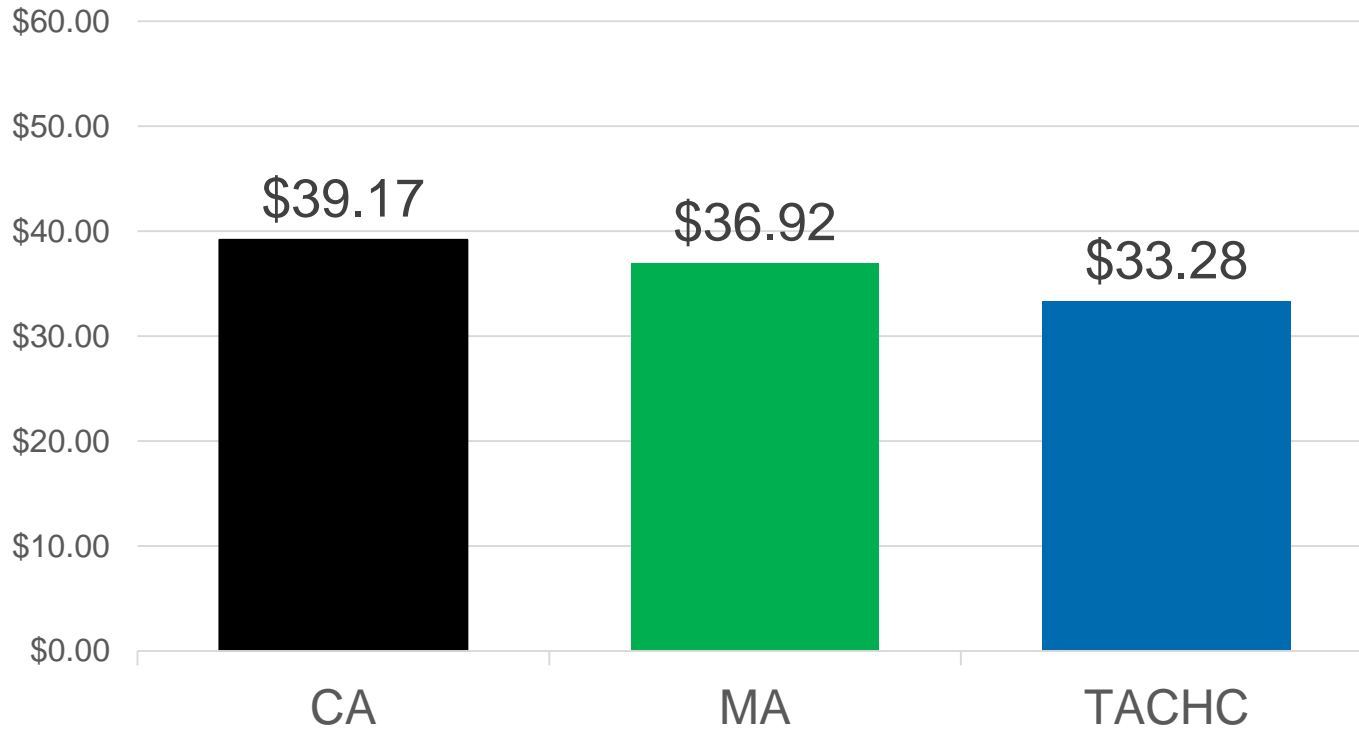


Source: Bureau of Labor Statistics
2023 TACHC Compensation Survey



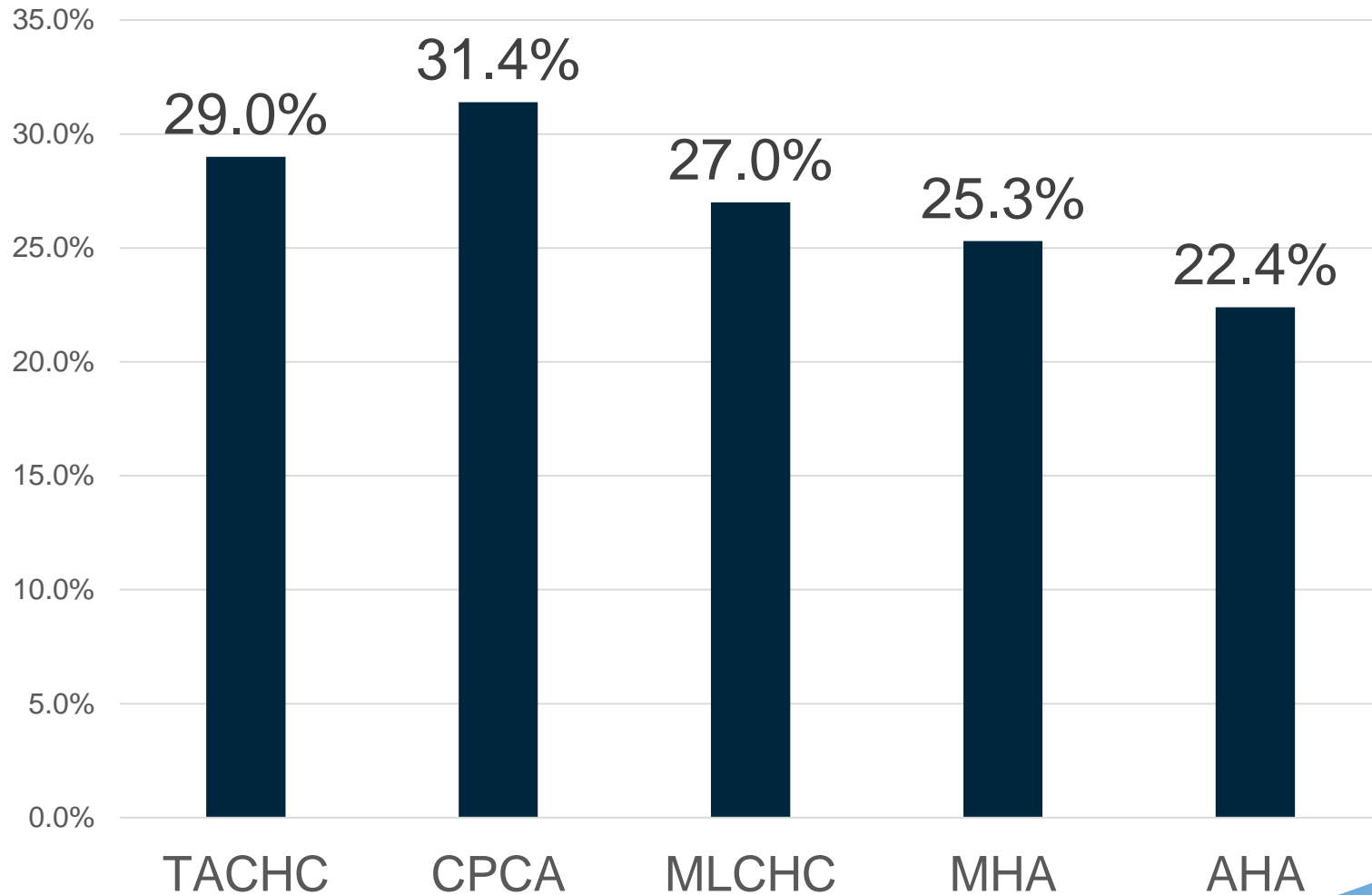
Staff Salary Growth

Average Hourly Rate – CHC RN





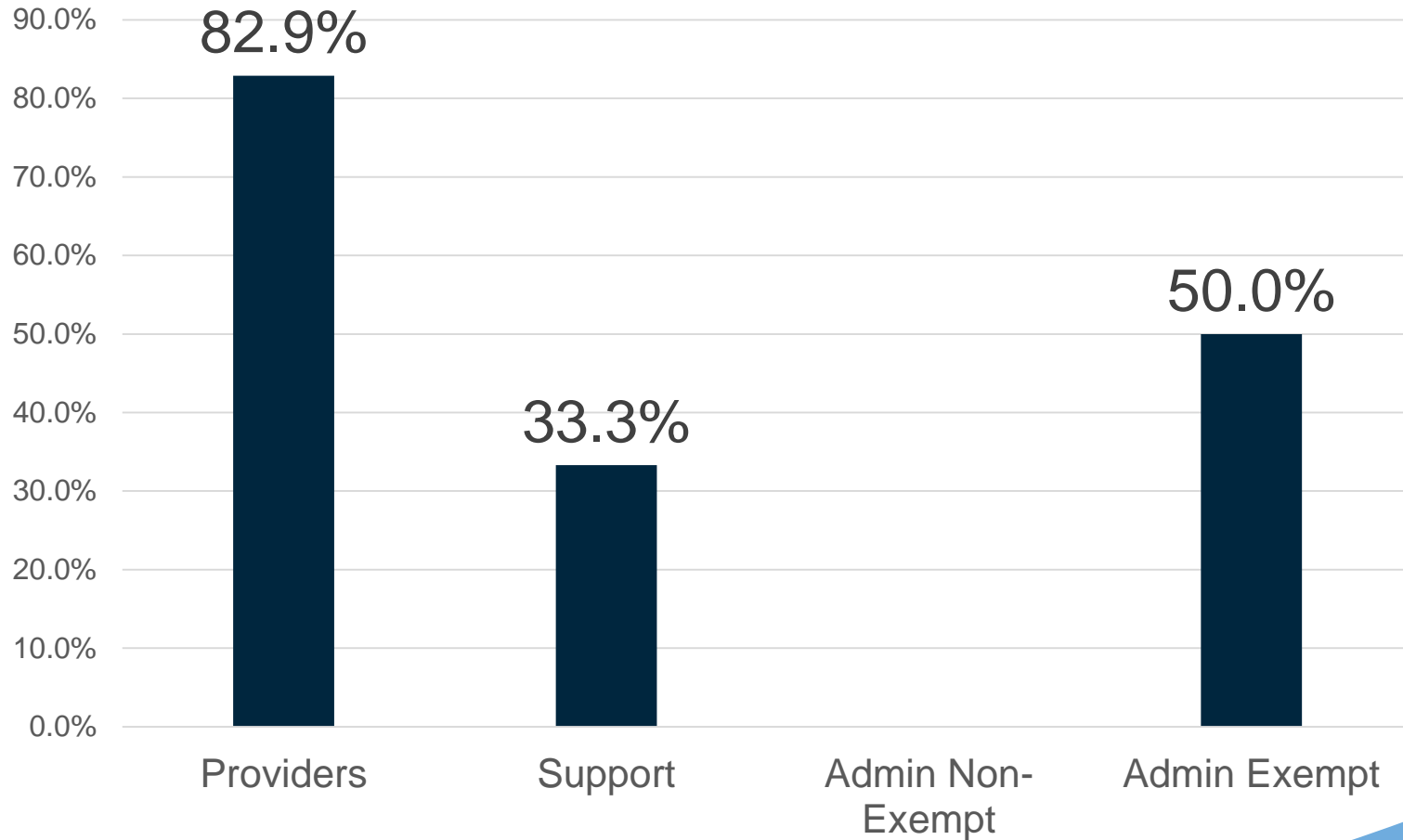
Turnover





Sign On Bonus

% Eligible by Group



Recruitment



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Recruitment Spend *Median*

2021 - \$15,000

2022 - \$24,000

Top Recruitment Tools

- 1 | Online job sites – 96%
- 2 | Contract recruiters – 65%
- 3 | TACHC Recruitment & Retention Services – 54%



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Questions?



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Thank you!

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