HUMAN RESOURCE STRATEGY AND IMPLEMENTATION PLAN:
CENTRAL OKANAGAN WORKFORCE DEVELOPMENT PROJECT

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Abstract

This study examines Human Resources (HR) and succession plan perceptions as well as barriers to small business support program use by small businesses in the Central Okanagan in order to facilitate the development of HR and succession planning programs small business will utilize and benefit from. This study validates and extends findings from previous research to the Central Okanagan region. Five interviews were conducted with small business owners from the Central Okanagan with less than fifty employees. Sample was selected from four industries: professional services, manufacturing, high tech, and finance due to their relative economic significance in the region. One-on-one interviews were chosen in order to protect confidentiality and reduce social desirability bias. Four out of five businesses sampled did not have HR or succession plans in place. Business owners stated that time was the major barrier to utilization of small business development programs. Lack of knowledge of services and agencies was a significant barrier to participation. Business associated funding with small business support agencies, and if funding was not required they did not participate in programs. HR and succession planning has been shown to contribute to strategic competitive advantage for businesses. If Okanagan businesses can be encouraged and supported to develop these plans their long-term survivability may be enhanced, maintaining the tax base and employment opportunities in the region.
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**Glossary**

**Ordinal level of measurement** - consists of numbered, ordered questions.

**Categorical variables** - divides data into groups by shared characteristics.

**Nominal variables** - assign names to data such as for yes-no questions,

**Closed-ended questions** - occurs when a specific answer is asked for from specific options given, and answers are limited to those options listed.

**Likert Scale** - an ordered rating scale where questions are asked in a structured manner and responses are scored along a range. The current research employs a five item scale.
Acknowledgements

Thank you to the Central Okanagan Economic Development Commission (COEDC), Dustyn Baulkham and Corie Griffiths, without whom this project would not have been possible. Lee Cartier, Sheilagh Seaton, and Barry McGillivray deserve special mention as professors and mentors. Thank you to the Research Ethics Board at Okanagan College, K. Bockhold and C. Whitten for allowing this research to go forward. The program and event coordinators at the college have made our presentation day possible, Alisa, Rita, and Jamie, as well as the team from the Dean’s office are much appreciated. Thank you to my family for their support and the college for having the Honours Program, allowing us to reach for our academic goals. Participants gave valuable information and the time to gather it and I thank them for their cooperation.
1.0 Chapter 1 Introduction

1.1 Introduction

Government organizations are mandated to create programs to benefit small businesses in Canada. Assessing business needs and barriers to participation is complex and time-consuming. A carefully-designed research study to address this need may help change the current situation where programs have been created and implemented, yet survivability of businesses has increased little, if at all (Audet, Berger-Douce, & St-Jean, 2007). The proposed research is designed to fill the knowledge gap identified by the Central Okanagan Economic Development Commission (COEDC). The COEDC initiated the Central Okanagan Workforce Development Project to analyze the needs for HR and succession planning programs which small business owners will participate in and benefit from (D. Baulkham, personal communication, September 26, 2015). The current research tests, extends, and tailors previous findings to determine if they apply to the Central Okanagan region. This chapter outlines business owners’ perceptions of agencies that provide programs to support small businesses, as well as the barriers to usage of these programs. This chapter further addresses the statement of the purpose and significance of this study as well as provides an overview of the nature of this report supplying a roadmap to the current research.

1.2 Background

Central Okanagan employers report a need for assistance in business development and management (COEDC 2014). Only one-third indicate having a Human Resources (HR) strategy to address their workforce requirements (COEDC 2014). Only two-fifths of businesses report having a succession plan for their management and more senior positions (COEDC 2014). The Central Okanagan Workforce Development Project is designed to address this need. However, Gasse, Tremblay, Menzies, & Diochon (2004) discovered less than 33% of 104 nationwide small business owners in Canada utilized economic development programs provided by government to assist entrepreneurs (Gasse, Tremblay, Menzies, & Diochon. 2004). Audet found a lack of knowledge of agencies and services available, along with poor understanding of the relevance of the services, and negative perceptions of the usefulness of these services to be the main barriers
to usage (Audet et al., 2007). However, it is important to note that the majority of small businesses who used government programs two or more times found them to be useful (Audet et al., 2007). The purpose of this study will be outlined in the following section.

1.3 Purpose
This research tests, extends, and tailors previous findings to determine if they apply to the Central Okanagan region. If these findings are duplicated here, they indicate that improving owner awareness of programs, and overcoming negative perceptions of the relevancy and usefulness of business services may expand the market for services which businesses will ultimately benefit from. Information found will support the development of recommendations suitable to the client’s needs for the creation of programs of benefit to small business through the exploration of the following Decision Statement:

To assess what HR and succession planning programs Central Okanagan small business owners will utilize.

This leads the development of the following research objectives which examine small business owners’ perceptions of the value of HR and succession planning as well as barriers to participation in HR and succession planning programs:

RO1 – Determine if Central Okanagan small businesses have HR and succession plans
RO2 – Assess owners’ perceptions of the value of HR and succession planning
RO3 – Identify the barriers to small business owners utilizing support programs
RO4 – Examine small business owners’ perceptions of public agencies which deliver these programs

The significance of the findings of this research is discussed in the following section.

1.4 Significance
This research examines Central Okanagan small businesses’ perceptions regarding HR and succession planning. Data gathered will be used to uncover barriers to involvement in small business development programs. The Central Okanagan Workforce Development Project
replicates some aspects of the Gaspe region study by Audet and extends the findings to the Okanagan (2007). This allows Economic Development Commission initiatives to be built upon and tailored to the Okanagan – leveraging the effect of the previous study and seeing whether results apply here. Recommendations from this research will increase the ability of The Central Okanagan Workforce Development Project to target its programs to those most in need and to deliver programs in a manner likely to increase involvement by those small businesses. The nature and scope of the report will be examined next.

1.5 Nature and Scope of the Report

The decision statement and research objectives in this report are outlined and responded to through the analysis of the findings of this study within the context of the literature. Chapter one has provided an overview of the small business support agencies and this study’s purpose. Chapter two discusses a literature review which examines perceptions of small business support agencies by owners as well as barriers to usage of small business programs. Chapter three outlines the research methodology and the rationale for the quantitative data gathering techniques and methods of analysis. Chapter four shares the analysis and findings of this study, and finally, Chapter five provides a conclusion and suggests future directions for research.
2.0 Chapter 2 Literature Review

2.1 Introduction

The Central Okanagan Economic Development Commission (COEDC) found a lack of support for businesses in the Human Resources (HR) and succession planning area, this lack of planning indicates that support services are needed, but there is little understanding as to what might work (2014b). These findings strengthen the case for the development of these resources in the Okanagan. Little research has been undertaken with specific regard to the perception of HR and succession planning and the barriers to utilization of programs to support small business. Building on prior work, this chapter will examine the perceptions of HR and succession planning and identify common obstacles to adoption of these practices as well as barriers to utilization of support services. Audet found that in the Gaspe region of Quebec “despite the fact that the number of small business support organizations have grown, small business survival has barely improved” (2007 p. 1). Gasse illustrates with their findings that “less than 33% of 104 nationwide small business owners in Canada utilized economic development programs provided by government to assist entrepreneurs” (2004 p. 9). This indicates a lack of utilization of business development programs despite prior efforts to engage with the small business sector. Research is needed to see if this is indicative of the Central Okanagan and the following decision statement is derived from this lack of utilization:

To assess what HR and succession planning programs Central Okanagan small business owners will utilize.

The following sections will discuss definitions of key terms used in this report, the value of HR and succession planning, and obstacles to adoption in small and medium businesses.

2.2 Definitions

This section will clarify important terms and concepts within this research. The introduction discussed the COEDC, a public agency that provides support for small businesses through various programs. The development of these initiatives is designed to meet the needs of constituents in various sectors. The design of these interventions takes thought, foresight, and research. The recommendations in this report are designed to meet this need for evidence-based
direction for program planning. The Commission is funded by and accountable to the elected board of the Regional District of Central Okanagan and serves an area encompassing the District of Peachland, District of West Kelowna, Westbank First Nation, City of Kelowna, District of Lake Country, Central Okanagan and Central Okanagan East Electoral Area.

Small Business programs offered by the COEDC are targeted to organizations with less than fifty employees. Research shows that business owners are under-represented in small business programs; therefore the COEDC is seeking recommendations on how to increase participation in future programming (COEDC 2014). Programs delivered by the COEDC and its partners and participants from the business community currently include business retention and enhancement, investment attraction, and economic development facilitation. Within these broad classifications, the COEDC plans to offer HR and succession planning support programs to small businesses through the Central Okanagan Workforce Development Project.

An important aspect of this project is HR planning, succession planning, and sustainable competitive advantage. For the purpose of this research, an HR Plan is understood to have comprehensive directives for the recruitment and retention of employees, and all other aspects of HR management to meet an employer’s needs for staffing now and in the future. A Succession plan outlines a succession process and naming a successor for key executive roles in the company. The term sustainable competitive advantage in the context it will be used here relates to how a business differentiates itself from its competitors with a lasting, unique offering. Authors Barney and Wright use the term V.R.I.O, which stands for value (price and quality), rareness (hard to find), imitability (difficult to emulate), and organization (readiness and ability to create value from resources and capabilities), to describe their version of the four aspects of sustainable competitive advantage (1997 p. 8). These definitions form the basis of understanding the concepts to be developed in the following sections of the document.

2.3 The Value of HR and Succession Planning

The previous section defined competitive advantage. The research of Campbell, Coff, & Kryscynski extends competitive advantage into the field of HR and “supports a variety of approaches that firms can take to construct human capital based competitive advantages,
including compensation design, employee selection, and job design” (2012 p. 377). All of the methods mentioned by Campbell et al. show HR planning is something that adds value to businesses.

2.3.1 Sustainable Competitive Advantage

HR planning has been shown to have value for a company. Companies are utilizing HR planning for effectively developing sustained competitive advantage. Southwest Airlines is an example of how HR and succession planning can lead to a sustainable competitive advantage for companies. Barney & Wright focused on Southwest Airlines in their working paper, “On Becoming a Strategic Partner: The Role of HR in Gaining Competitive Advantage” (1997). The authors state that Southwest airlines utilized HR planning, becoming “the most financially successful airline over the past 20 years and continually being among the best in the industry for having the fewest customer complaints” (1997 p. 9). According to Quick, “Crafting an Organizational Culture: Herb’s Hand at Southwest Airlines”, quoted in Pfeffer, Southwest airlines has almost half as many employees per plane, flies three times as many passengers and has more seat miles available per employee than industry average, and has maintained similar standing from 1992 to present (2005 p. 96). Barney & Wright select this carrier as an effective example of HR planning stating: "the HR of Southwest Airlines serves as a source of sustained competitive advantage because they create value, are rare, and are virtually impossible to imitate" (1997 p. 9). This is the concept of VRIN in action. Pfeffer (2005) ascribes these achievements to changing the relationship with the employee by teaming with them to create mutual gains, rather than seeing employees primarily as a cost to be minimized. Determining whether Central Okanagan companies are utilizing HR planning to create and maintain sustainable competitive advantage, and if not, how to convince them to do so and to extend these inquiries to succession planning and its benefits will be examined next. An examination of how these best practices may be applied to Okanagan small businesses is necessary. There are potential obstacles to the application of succession planning programs in the Okanagan, and these need to be identified and provisions made to overcome them.
2.4 Obstacles to Adoption in Small and Medium Businesses

The COEDC on its Business Walk found that of the fifty businesses surveyed, “less than half (46%) said they had a formal succession plan for the business (May 2015 p.6). Literature on this topic such as, “Succession Planning: A Leader’s Roadmap for Identifying & Developing Tomorrow’s Leaders Today” describe succession planning as a five step process, but this literature is not tailored to the Okanagan region (Government of New Brunswick, p. 13, 2010). With clearly defined stages, their succession planning roadmap provides a baseline upon which effective support programs can be built. Cadieux builds on the roadmap concept by adding a typology of predecessor roles, to illustrate how transitions, departures and instatements can be dealt with (2007). There are some indicators of succession readiness in firms. For example, Pontet, Wrosch, & Gagne found "the more control a successor has, the greater the indication of succession readiness on the part of the incumbent" (2007 p. 339). Furthermore, Le Breton-Miller, Miller, & Steier, created an integrative model of succession, which can be used as part of a best practices toolkit when developing programs for entrepreneurs regarding succession planning (2004). It may be the case that Okanagan businesses lack HR and succession plans, but this research requires validation in order to determine the best way to move forward in the Okanagan.

(RO1) – Determine if Central Okanagan small businesses have HR and succession plans, examine this issue, and fill the information gap for the Central Okanagan in regard to this concept.

2.4.1 Perceptions of Value

In this section the motivations for companies to overcome the barriers to adoption of HR and succession planning will be examined. In “The Truth About the Coming Labor Shortage”, Grossman identified an increasing shortage of skilled labour in 21st century economies, which necessitates effective HR strategies for companies to recruit and retain employees (2005). It is promising that the COEDC recognizes the urgency of this task, but effective implementation of support programs that further this goal will require the evaluation of existing perceptions of the value of HR support programs by small business owners, and the identification of methods of communicating the value and urgency of HR development to owners. (2014a, 2014b). Unique challenges facing Kelowna businesses’ commitment to HR and succession planning might include seasonality, lack of long-term thinking, lack of reinvestment in the community and
infrastructure (D. Baulkham, personal communication, September 26, 2015). The above points form the rationale for RO2:

**RO2 – Assess owners’ perceptions of the value of HR and succession planning.**

### 2.4.2 Barriers Facing Small Businesses

Cultural and social barriers affect companies' willingness to engage in succession planning, and this is especially true in small and medium-sized businesses “giving up the company is like signing one's own death warrant” (Barnes & Hershon, 1976, p. 107, Le Breton-Miller, Miller, & Steier, 2004). Bruce & Picard found a gap in the literature in regard to barriers to succession, they stated “The first area in need of further research is a mapping of what motivates business owners to plan ahead of time for succession” (2006 p. 308). Emotional and psychological barriers can prevent business owners from engaging in succession planning, as McClure, Ward, &. Aronoff describe: “Who enjoys thinking about death or disability, making choices among children, and letting go of a powerful, prestigious secure position for an uncertain future?” (2011 p.9). This reluctance of incumbents to think about succession may need to be examined in order for recommendations to be made regarding how to overcome it, if it is identified as a barrier in the Central Okanagan. These articles discuss themes related to RO3:

**RO3 – Identify the barriers to small business owners utilizing support programs.**

In the Gaspe region, a study of 70 small business owners identified perceptions of certain owner-managers of small business services utility and relevance, as well as a lack of knowledge of programs and agencies providing the services as the main barriers to utilization of business support programs (Audet et al. 2007 p. 1). Audet found the main barrier to small business owners in the Gaspe region of Quebec utilizing support programs was “lack of knowledge about the agencies providing the services” (2007 p. 1). Also, more than 80% of respondents who had never used a support agency felt “the services offered were not very or not at all suited to their needs” (2007 p. 37). These findings replicate those of The Organization for Economic Development and Cooperation’s Entrepreneurship and Local Economic Development Program and Policy Recommendations in 2003. This indicates the importance of RO4:
RO4 – Examine small business owners’ perceptions of public agencies which deliver these programs.

2.5 Conclusion
As the ROs have shown, the intent of this research is to examine small business owners’ perceptions of the value of HR and succession planning as well as barriers to participation in HR and succession planning programs, and then to make recommendations on how to develop HR and succession planning programs that Central Okanagan small business owners will utilize. The following research objectives are designed to attain these stated goals:

RO1 – Determine if Central Okanagan small businesses have HR and succession plans
RO2 – Assess owners’ perceptions of the value of HR and succession planning
RO3 – Identify the barriers to small business owners utilizing support programs
RO4 – Examine small business owners’ perceptions of public agencies which deliver these programs

Building programs that small businesses will use and benefit from takes insight developed through direct communication with key stakeholders in industries with the best prospects for long-term viability within the region’s unique resource and capability profile.
3.0 Chapter 3 Research Methodology

3.1 Introduction
The research problem is to assist the client in developing targeted, industry-segmented programs which a specific subgroup of Central Okanagan small businesses will attend. Lack of knowledge, poor understanding of relevance, and a negative perception of agency usefulness were noted as among the main barriers to usage of public agency services to small business (Audet et al., 2007 p. 37). The current research tests, extends, and tailors previous findings to determine if they apply to the Central Okanagan region. As such, this chapter outlines the methodology followed in this study, including study design, sample description, and the method of data collection. As well, it discusses the process used for instrument evaluation and analysis.

3.2 Research Design
Seven semi-structured audio-recorded interviews of approximately 20 minutes in length were conducted with one member of each of four industries. This forms the basis of the research methodology and allows for some quantitative analysis, due to the semi-structured nature of the data collection. These interviews provided information on perceptions of Human Resources (HR) and succession planning and programs for businesses in the Central Okanagan. Qualitative research methods support the descriptive research goals of this project with the detailed information required. These methods best provide the nuanced level of data required to create the specific recommendations the client desires. By using a semi-structured interview method, quantitative methods for analyzing data may be used as well to facilitate the use of quantitative statistical analysis methods. Next, the sample design will be discussed.

3.3 Sample Design
As incumbents are key to initiating the process of succession planning in small businesses, the target population is small business owners in the Okanagan with less than fifty employees. As a result, the unit of analysis consists of small business owners from the Central Okanagan (Pontet, Wrosch, & Gagne, 2007; Cadieux, L., 2007). The sample size is five business owners drawn
from the industries of professional services, manufacturing, high tech, and finance. These industries were selected for the interview sample due to their relative economic importance in the region by the client (D. Baulkham, personal communication, September 26, 2015). The client provided contacts and introductions for participants (D. Baulkham, personal communication, September 26, 2015). Data collection methods follow in section 3.4.

3.4 Data Collection Methods
Primary research data were collected through one-on-one audio-recorded interviews with small business owners. Interviews were approximately twenty minutes long with each participant (see the attached Appendix A for the interview questions.). Scales for quantitative questions were derived from the work of Audet et al, which identified barriers to usage of small business support programs in the Gaspe region of Quebec (2007). The Central Okanagan Workforce Development Project replicates some aspects of the Gaspe region study and extends the findings to the Okanagan. Scales and methods of instrument evaluation are detailed in section 3.5.

3.5 Instrument Evaluation
One-on-one interviews were chosen as an instrument due to privacy and confidentiality issues in regards to proprietary client information being shared in the study regarding staffing and succession issues. As well, with a group of small business owners, most of whom know each other, a group setting would introduce the possibility of social desirability bias coming into play as business owners may feel pressured to provide the ‘popular’ response therefore skewing the results. Sharing that they do not have HR or succession plans may be perceived as less desirable than presenting as if these plans are place to a greater degree than they are. Therefore, to avoid this, one-on-one interviews were selected as the most appropriate instrument. The following measures were taken to ensure the reliability, validity, and sensitivity of the interview instrument. In order to ensure that ethical procedures were adhered to, the project was presented to the Research Ethics Board and approved. Furthermore, reliability and validity were addressed by pre-testing the interview instrument with subject matter experts in HR and succession planning. After the pre-test, the research team suggested adjustments to the interview instrument which reduced ambiguity and improved the understandability, and relevance of the questions to the research objectives. In order to improve the level of sensitivity and ensure that quantitative
analysis could be conducted on applicable questions, 5-point Likert scales were employed where relevant.

3.6 Analysis
As the reliability, validity, and sensitivity of the survey instrument has been assured, the data analysis methods will now be described. Likert Scale questions were asked in a structured manner allowing systematic analysis and presentation of themes in table form. Furthermore, data is combined by theme; they are then analyzed and presented in easy to understand tables and figures to enhance readability and comprehension. Themes identified from secondary research include the perceived value of HR and succession planning, and barriers to usage of small business support programs provided by public agencies. Themes of barriers to usage include a lack of knowledge of programs, and a lack of perceived relevance to business industries. Also, perceived usefulness of information, as well as the perception of how well tailored the information was to individual small businesses acted as barriers to usage when not rated highly by small business owners. Refer to Glossary at beginning of document for the definitions of specific terms which appear in the following section.

3.7 Conclusion
Analysis will lead to insights from this study. Actionable items from this study include recommendations on how to overcome barriers to participation in programs. It is also intended that this research helps identify needs of small business owners in the Okanagan in regards to HR and succession planning. The needs analysis portion of the research is designed to enhance the successful implementation of HR and succession plans for small businesses. Limitations of the research design include the fact that the small sample is not randomly selected and accordingly, results for interviews are not generalizable to the population as a whole (Zikmund, Babin, Carr, Griffin, 2013).
4.0 Chapter 4 Findings and Discussion

4.1 Introduction

Chapter four begins with a discussion of the five participants selected for the study. It then examines the research objectives in relation to knowledge gaps in regards to Human Resources (HR) and succession planning in the Central Okanagan. Small business owners' perceptions of small business support programs and barriers to the use of the programs are examined as well. These research objectives will be discussed further in chapter five. Findings of the scale level questions are listed in Appendix B. This chapter will now begin with an overview of the participants.

4.2 Participants

There are five participants in this study. They have been selected from Central Okanagan small businesses with less than fifty employees, in key industry segments identified as of interest to the client, The Central Okanagan Economic Development Commission, based on the relative economic contributions of industries in the region. The client selected the participants and provided contact information. The gender, number of employees and industry of the business owners selected are shown in Table 4.1 below.

Table 4.1: Participants

<table>
<thead>
<tr>
<th>ID #</th>
<th>Gender</th>
<th>Number of Employees</th>
<th>Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Female</td>
<td>4</td>
<td>Professional Services</td>
</tr>
<tr>
<td>2</td>
<td>Male</td>
<td>42</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>3</td>
<td>Male</td>
<td>17</td>
<td>High Tech</td>
</tr>
<tr>
<td>4</td>
<td>Male</td>
<td>13</td>
<td>Finance</td>
</tr>
<tr>
<td>5</td>
<td>Male</td>
<td>4</td>
<td>Finance</td>
</tr>
</tbody>
</table>
4.3 RO1—Determine If Central Okanagan Small Businesses Have HR and Succession Plans

As not all of the participants were clear on what HR and succession planning was, the definitions used for this research will be given next. HR Planning is an integrated practice that involves recruitment and retention. It includes job descriptions, and what retention methods are used, as well as policies and procedures regarding benefits, and how conflict is handled and issues are resolved, among other things. Succession planning includes a written naming of replacement personnel for the key management positions within an organization. Four employers interviewed said they have no written HR and succession plan, one had an unwritten HR strategy while one had a succession plan being activated and implemented by management, see Figure 4.1 below.

![HR and Succession Plan Status of Sample](image)

*Figure 4.1 HR and Succession Plan Status*

Upon probing, company one said that they have more of an oral culture, and are very aware of what is happening with their staff, staffing needs, and that they evaluate, analyze, and fill future needs by training current staff to meet projected needs. Excerpts of owner statements appear in Table 4.2 below.
4.3.1 Succession Planning

From participants’ responses to inquiries about succession plans, it was apparent that some companies have limitations on their succession process. Company two stated that their entry level staff do not have the management skills necessary to step-up to management roles in the longer term due to the limitations of their specialist labour level abilities. Also, not all companies are ready for succession planning, in their own estimation, as shown in Table 4.3 below.

<table>
<thead>
<tr>
<th>Why Don't You Have a Succession Plan?</th>
</tr>
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<tbody>
<tr>
<td>“1: We have a long term strategy... but we don’t have an overall plan written down”</td>
</tr>
<tr>
<td>“2: Not a written plan, but we have a plan”</td>
</tr>
<tr>
<td>“3: I think we haven’t gotten to a large enough the size for that to be applicable yet, but we’re getting there”</td>
</tr>
</tbody>
</table>

4.4 RO2 – Assess Owners’ Perceptions of the Value of HR and Succession Planning

The findings regarding succession planning above indicate that a number of companies in the Central Okanagan see the value of HR and succession planning for a different stage in their development than they currently find themselves, as outlined in Table 4.4 below.

<table>
<thead>
<tr>
<th>Why Don't You have an HR Plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;1: We have the components, but we don’t have it written as a strategy, we have all of the pieces...but we don’t have it written down all in one place”</td>
</tr>
<tr>
<td>“2: We deal with things as they come up”</td>
</tr>
<tr>
<td>“3: Well we’ve been finding really good people... We actually have a lineup of people who are ready to work with for us... So we’ve been fortunate I guess”</td>
</tr>
</tbody>
</table>
Table 4.4 Owners’ Perceptions of HR Planning

<table>
<thead>
<tr>
<th>Owners’ Perceptions of the Value of HR Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;1: Extremely relevant, we just don’t happen to write all of the components as a piece.”</td>
</tr>
<tr>
<td>“2: Well we’ve been in business 25 years doing the same thing ... we know what we need for employees in certain areas... it’s not something I felt we need at this point.”</td>
</tr>
<tr>
<td>“4: I would say the reality is its less important now than it will be.”</td>
</tr>
<tr>
<td>“5: At this point, I don’t think it’s too relevant.”</td>
</tr>
</tbody>
</table>

4.4.1 HR Plan Urgency

Employer’s perceptions of the value of HR and succession planning indicated the relative urgency of HR planning to them. HR plan urgency ranged from very urgent, to somewhat, to not at all, as illustrated in Appendix B. Owner one rated the concept as extremely urgent, yet had no written HR plan. Owner two seemed to downplay their understanding of the urgency of HR planning. Owner two seems to be associating HR planning with contingency planning for upcoming HR needs. Another theme is the association of HR planning with budgets and having a designated HR person indicated by participant four’s statement in Table 4.5 below.

Table 4.5 HR Plan Urgency

<table>
<thead>
<tr>
<th>HR Plan Urgency</th>
</tr>
</thead>
<tbody>
<tr>
<td>“1: Extremely urgent – we can waste a lot of money with the wrong people or too much people, or wrong skills”</td>
</tr>
<tr>
<td>“2: …we currently use a head-hunter so if something happened that wasn’t planed we would act with the head-hunter we would right away outsource it.”</td>
</tr>
<tr>
<td>“4: …if’ budgets were unlimited, I’d say we’d benefit from having somebody tomorrow…It would be less important today than maybe 3-5 years from now.”</td>
</tr>
</tbody>
</table>

4.4.2 Succession Plan Perceptions

Company owners spoke about succession plans in regard to their current employees with high potential for advancement and their hiring plans with an eye toward succession. Participant two mentioned how they have a family succession plan and many supervisors to meet unexpected management requirements. Participant four indicated they have cross-training to give employees experience in a variety of jobs. Company four hires from within as part of their succession
planning by hiring high potential young people and grooming them for more senior roles. These findings are demonstrated in Table 4.6 below.

Table 4.6 Succession Plan Perceptions

<table>
<thead>
<tr>
<th>Succession Plan Perceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>“2: ...if something happened downstairs my dad or I’d take over, I have enough supervisors I don’t think I’d get caught in a spot I couldn’t move somebody up.”</td>
</tr>
<tr>
<td>“4: ...you don’t really want a huge, excessive bench, just because you can’t tolerate the overheads. So we don’t have a deep pool of people that you would say, o.k. if this person moves on, we’re going to grab this person and go there.”</td>
</tr>
</tbody>
</table>

4.4.3 Succession Plan Relevance
Succession planning was not urgent for all but one of the owners interviewed. Participant four stated that succession planning becomes more important later, saying the owners want to be able to replace their positions and get out when the company gets closer to its planned exit strategy of a sale. Participant number five is the successor in the process of transition with the incumbent, a financial planner. The successor spoke about the motivations for the incumbent’s succession planning and the results are in Table 4.7 below.

Table 4.7 Succession Plan Relevance

<table>
<thead>
<tr>
<th>Succession Plan Relevance</th>
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</thead>
<tbody>
<tr>
<td>“1: …we have life insurance for that - But really, if something happens to J, its life insurance – that’s the reality of a small business – I legally can only own 50% of this business.”</td>
</tr>
<tr>
<td>“4: …right now we’re a pretty young group. We’re still kind of in building and growth mode, so, we’re not really to a point where guys are looking for an exit.”</td>
</tr>
<tr>
<td>“5: …that is all customer focused. …it’s not about the money for him. It’s about somebody to continue on and look after his clients. The best way that he feels is right.”</td>
</tr>
</tbody>
</table>

4.5 RO3 – Identify the Barriers to Small Business Owners Utilizing Support Programs
As perceptions of plans have been discussed, barriers to the utilization of support programs will now be examined. Barriers to utilizing small business support services included having time to attend these programs. Some small business owners felt that they do not require the services of small business support organizations, as they have all of the acumen they require. The stage of
development of a company is perceived by some small business owners as a limitation to their access to small business support programs. Geography is another consideration for small business program use. Participant four indicated that most of their clients were in remote rural communities and they preferred to utilize programs for small business support in those regions. The results are included in Table 4.8 below.

Table 4.8 Barriers to Small Business Utilizing Programs

<table>
<thead>
<tr>
<th>Barriers to Small Business Owners Utilizing Support Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>“1: No, we haven’t found anything relevant to the type of people that we need. Honestly, and this may not be the answer you want to hear, but I know what I’m doing, and I feel comfortable in the decisions that we’re making.”</td>
</tr>
<tr>
<td>“2: Basically time, I know we’ve been invited to a few of the roundtable sessions and it’s just there again time is valuable although I sit on two boards directly tied to our industry.</td>
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<tr>
<td>“3: Primarily, most of these programs are kind of designed for earlier stage companies.”</td>
</tr>
<tr>
<td>“4: …we’re more active in communities where we do generate more local business.”</td>
</tr>
<tr>
<td>“5: No, just really, our time. Again, we’re a pretty successful office.”</td>
</tr>
</tbody>
</table>

4.6 RO4 – Examine Small Business Owners’ Perceptions of Public Agencies Which Deliver These Programs

Barriers to program utilization may be related to perception of public agencies providing these programs. Programs were found to be relevant by a number of the participants. Company one stated that they believed small business support programs for their industry were targeted at low-skilled workers, and they only had high-skilled workers, so the programs would not be accessible to them. Company two mentioned a program they took their supervisor to which was industry-targeted and very productive for them. Participant three found one particular agency to be very helpful in their success, finding them a key grant opportunity, and felt the agency had contributed to the success of dozens of companies in the valley. Participant four, however, found no relevance for the programs he knew about. Upon follow-up questioning it became clear the participant was thinking of business networking groups for potential clients and the participant sourced clients from out of town at trade organizations instead. These findings are illustrated in Table 4.9 below.
Table 4.9 Small Business Owners’ Perceptions of Agencies

<table>
<thead>
<tr>
<th>Business Owners’ Perceptions of Public Agencies</th>
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</thead>
<tbody>
<tr>
<td>“1: …if they are applicable it’s to really big versions of us that have specific job types… You have to be substantively big to have low skilled staff.”</td>
</tr>
<tr>
<td>“2: UBCO actually has a program and I did one with one of my supervisors this spring and it was beneficial and they invited all of the companies in the Okanagan.”</td>
</tr>
<tr>
<td>“3: …AO has been a huge help to dozens of companies in town… they’ve also helped a lot of companies become successful so they’ve been really good.”</td>
</tr>
<tr>
<td>“3: …they kind of helped us in regards to how to build a company and pitching, and even what grants to apply for... so that was a game changer.”</td>
</tr>
<tr>
<td>“4: I don’t see a fit… most business that we kind of chase… I wouldn’t say are really overly prevalent in more professional organizations… It’s not really in this type of a circle.”</td>
</tr>
</tbody>
</table>

4.7 Conclusion

Perceptions of public agencies delivering programs have been shown to be a barrier in regards to lack of knowledge of programs. Previous research has shown that small businesses in the Central Okanagan are inhibited by many knowledge gaps and barriers to usage of support programs for HR and succession planning. The analysis of RO1, RO2, RO3, and RO4 (see p. 2 for the ROs in full form) have identified the gaps and barriers limiting business owners in the Okanagan from utilizing support programs. Chapter five details the gaps and barriers identified in chapter four, and provide recommendations to be implemented in the next steps of the HR Strategy and Implementation Plan: Central Okanagan Workforce Development Project.
5.0 Chapter 5 Recommendations

5.1 Introduction

Addressing the inferences from each of the research objective findings from chapter four is the objective of this chapter. Chapter five covers all four research objectives: RO1: determine if Central Okanagan small businesses have Human Resources (HR) and succession plans, RO2: assess owners’ perceptions of the value of HR and succession planning, RO3: identify the barriers to small business owners utilizing support programs, RO4: examine small business owners’ perceptions of public agencies which deliver these programs. Limitations of the research project are outlined in order to facilitate the appropriate application and interpretation of conclusions and recommendations in this document.

5.2 Research Objectives Conclusions

The results of this research have identified several gaps within the Central Okanagan small businesses community with a view to all the research objective topics. These gaps hamper the achievement of sustainability in the sector and reduce the strategic competitive advantage of these businesses. A finding which differed from the literature was that Okanagan small businesses did not know what HR and succession planning were. Determining whether Central Okanagan businesses have HR and succession plans is the first step in extending previous findings to this region.

5.2.1 RO1 – Determine if Central Okanagan Small Businesses Have HR and Succession Plans

Four of the five companies interviewed did not have HR plans and four of the five companies sampled did not have succession plans.

5.2.2 RO2 – Assess Owners’ Perceptions of the Value of HR and Succession Planning

As the majority of organizations did not have HR and succession plans, examining their perceptions of these plans becomes necessary. Neither the “Growing in the Okanagan: 2020”, nor “The HR Strategy and Implementation Plan: Central Okanagan Workforce Development Project” documents made any mention of the findings of this study that indicate Okanagan small business owners sampled do not know what HR and succession plans are, as reflected in the five
case studies here. This indicates a knowledge gap that needs to be filled. In several cases studied, managers are making do with reactive HR rather than proactive HR and succession planning. A consistent obstacle identified to implementing succession planning among businesses sampled is the relatively young age of the management in the Central Okanagan, as they are reluctant to engage in the subject. Company executives often think if they have a young management team they do not have to worry about this important aspect of management planning. Money was a concern shared by participants regarding HR and succession plan perceptions. The costs of being able to maintain and afford the number of employees perceived to be necessary for succession planning was a concern. Succession planning forms a unique challenge for companies, primarily because they do not know what it is and are unclear of the value of this process. None of the small business owners sampled utilized small business support programs to craft succession plans, the barriers to small business support organizations become a topic of focus in the next section.

5.2.3 RO3 – Identify the Barriers to Small Business Owners Utilizing Support Programs
The top barrier to implementing HR and succession plans was timing, both in terms of having time and it being the 'right' time.

The degree of tailoring of the program to particular types of businesses, was a barrier to implementation as well.

Lack of knowledge of programs seems to be a barrier to utilization of small business programs as identified in the literature and validated in these case studies. Each employer seemed to know of only one program or agency, yet was unaware of other programs and agencies.

Also, small business support agencies were strongly associated with funding options for hiring or growth among businesses sampled. Most organizations sampled used only one small business development program, and it became apparent that they assumed this was the primary organization or program available to them. Through the interview process it became clear that owners were unaware of the many programs and agencies available to support their small business.
5.2.4 RO4 – Examine Small Business Owners’ Perceptions of Public Agencies Which Deliver These Programs

Findings showed an apparent conflict between the overall impressions of the support structures, which were seemingly largely positive, and the willingness to make use of them for HR and succession planning. Business owners sampled either felt they do not need the services of small business support agencies, due to having acumen within the firm, or they did not have the time to utilize services and they were successful enough without any agency support. Some owners found small business support programs very beneficial, even essential to their business growth and development. This leads to the decision statement designed to address the knowledge gaps in regard to this issue.

5.3 Decision Statement Conclusions

It is clear that businesses sampled feel they do not have the time or see the value of small business support programs for HR and succession planning to their business currently. For a variety of reasons it is unlikely they will utilize and benefit from any small business development programs aimed at HR and succession planning at this time. Next, the limitations of this study and its conclusions and recommendations will be discussed.

5.4 Limitations

This study focuses on five business owners in the Central Okanagan with fifty employees or less. This is a small sample non-randomized study. Results cannot be generalized to the Okanagan as a whole or considered to be representative of the region or it's small business owners as a whole. Businesses were selected by the client based on their industry’s economic significance to the region and are not representative of the relative distribution of these industries in the Okanagan. Due to the exploratory nature of the study further quantitative research may need to be conducted to validate and extend the findings of the study. The conclusion and recommendations outline how to overcome the barriers to utilization of these programs.

5.5 Conclusion and Recommendations

Possible recommendations as to potential avenues or changes to address gaps identified will now be discussed. These findings differed from previous studies in that four of the five sampled small
business owners did not understand exactly what HR and succession planning were. This identifies a need for some education in what a particular plan is before one is able to persuade business owners of the value of these plans. If the COEDC sees strong merit in the implementation of HR and succession plans for Okanagan businesses, it may be helpful to write up some specific recommendations including what exactly a HR and succession plan is and include some examples of each to be shared with small businesses in the Okanagan.

Also, further research may be indicated in how to teach small business owners the value of HR and succession planning and why this process is so important. This study has validated the findings from other research that the small business owners sampled are not implementing HR and succession plans. Most owners did not see HR or succession planning as relevant or urgent at this time.

As barriers to program usage include organizations not having the time to avail themselves of services it is unlikely that more or better promoted programs will increase participation. Business owners are time-poor and one-on-one on-site consultations may be beneficial at the employers’ workplaces in order to increase participation.

Previous studies have identified the goal of attracting and retaining young workers in the Okanagan. Supporting these initiatives may provide the pool from which to draw possible successors for business management positions in the future.

While this research is naturally exploratory due to its small sample size, the interview questions where designed with possible adaption to survey style in mind. This conversion to a survey method would enable the researcher or client to more easily achieve a larger sample size and therefore a greater possibility of statistically significant results. Statistically significant results would be more generalizable and would as such be more useful for providing suggestions for changes which would help businesses survive and thrive into the future.
References


Appendix A: Interview Questions

1. Does your organization currently have a written HR strategy for recruitment and retention?
   
   **If No:** **Probe** – Why not?  
   **Then** – skip to question 3
   
   **If Yes** – go to next question

2. What resources such as agencies, books, workshops, and consultants, were beneficial in the development of your company’s written HR strategy for recruitment and retention?  
   **Probe** - Why?

3. Does your organization currently have a written succession plan?
   
   **If No:** **Probe** – Why not?  
   **Then:** Skip to question 5
   
   **If Yes** – go to next question

4. What resources such as agencies, books, workshops, and consultants, were beneficial in the development of your company’s succession plan?  
   **Probe** - Why?

5. How relevant is having a written HR strategy for recruitment and retention to your business?  
   
   Not at all Relevant
   Of Minor Relevance
   Somewhat Relevant
   Very Relevant
   Essential

   **Probe** – Why or why not?
6. How relevant is having a written succession plan to your business?

- Not at all Relevant
- Of Minor Relevance
- Somewhat Relevant
- Very Relevant
- Essential

**Probe** – Why or why not?

7. How urgent is having a written HR strategy to your business?

- N/A
- Not at All Urgent
- Somewhat Urgent
- Very Urgent
- Of the Utmost Urgency

**Probe** – Why or why not?

8. How urgent is having a written succession plan to your business?

- N/A
- Not at All Urgent
- Somewhat Urgent
- Very Urgent
- Of the Utmost Urgency

**Probe** – Why or why not?

9. Have you or has your company participated in public agency programs to support small business development?

**If Yes:** **Probe** – Why?

**Probe** – What programs did you participate in?

10. If **Yes:** **Follow-up:** Is anything limiting your ability to participate in more public agency programs to support small business?

   - Yes/No

**If Yes:** Ask question 11
### If No: Skip to question 12

11. What are the factors preventing you from attending a public agency business development program?

**Probe - Why?**

12. Thinking of public agencies providing small business development programs such as training, workshops, and consulting, – How would you rate program relevance to your industry? (Is program current with industry trends, needs, regulations and demands?)

   - N/A
   - Not at all Relevant
   - Somewhat Relevant
   - Very Relevant
   - Essential

**Probe – Why?**

13. Thinking of public agencies providing small business development programs – How would you rate the tailoring of information to your business/industry? (Is the program adapted specifically to your business needs, schedules, timelines, and way of doing business?)

   - N/A
   - Not Tailored
   - Somewhat Tailored
   - Very Tailored
   - Completely Tailored

13a **Probe – Why?**

14. Thinking of public agencies providing small business development programs – How would you rate the usefulness of the information to your business?

   - N/A
   - Not Useful
   - Somewhat Useful
   - Very Useful
   - Of the Utmost Usefulness
<table>
<thead>
<tr>
<th>Probe – Why?</th>
</tr>
</thead>
<tbody>
<tr>
<td>15. What resources that are beneficial in the development of HR and succession</td>
</tr>
<tr>
<td>plans such as workshops, consulting, mentorships, and roundtables, would</td>
</tr>
<tr>
<td>like to see provided by public agencies?</td>
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</table>

<table>
<thead>
<tr>
<th>Probe - Why?</th>
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<tbody>
<tr>
<td>16. What specific resources that are beneficial in the development of</td>
</tr>
<tr>
<td>succession plans would like to see provided by public agencies?</td>
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</tbody>
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*Prompt (such as agencies, books, workshops, and consultants).*

<table>
<thead>
<tr>
<th>Probe - Why?</th>
</tr>
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<tbody>
<tr>
<td>17. Are you male or female?</td>
</tr>
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</table>

| 18. What is the approximate number of full time equivalent employees at    |
|     your business?                                                       |
## Appendix B: Participant Responses

*Table 4.10 Participant Responses*

<table>
<thead>
<tr>
<th></th>
<th>Very</th>
<th>Somewhat</th>
<th>Of Minor Relevance</th>
<th>Not at all Relevant</th>
<th>Not Sure</th>
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<tbody>
<tr>
<td><strong>HR Plan Relevance</strong></td>
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<td><strong>HR Plan Urgency</strong></td>
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<td><strong>Succession Plan Relevance</strong></td>
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<td><strong>Succession Plan Urgency</strong></td>
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<td><strong>Of the Utmost Usefulness</strong></td>
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*Note: The values are represented by symbols, which are not clearly visible in the image.*