

## Corporate Social Responsibility in Family Business: A Perspective of Mexico

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### *Abstract*

*Corporate Social Responsibility (CSR) is generally associated to large firms, on which most of the theoretical and empirical studies have been oriented and published at the moment. In addition, there are relatively few studies focused on CSR in Small and Medium-sized Enterprises (SMEs). Moreover, even studies that relate this important construct in family SMEs are scarcer. In this sense, some researchers and academics have suggested that in family SMEs it is not possible to implement CSR, while another group of researchers consider that family SMEs are so by nature. Therefore, this research, using a sample of 297 family SMEs of Aguascalientes State (Mexico), aims to essentially identify CSR that this type of companies have. The results show that both social and environmental factor and economic factors are good predictors of CSR developed in family SMEs.*

**Key Words:** *Corporate Social Responsibility, Family Firms, Small and Medium-Sized Enterprises.*

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### **Introduction**

Recently, in the literature, the number of researchers, academics and professionals in business science and management that have been analyzed and discussed, through theoretical studies and empirical, the impact of family businesses in different activities and operation of businesses, has increased; among their investigations on social responsibility (Dyer, 2006). Therefore, it is more often to find in the literature published papers comparing the performance between family enterprises and non-relatives, through the return of investments (Anderson & Reeb, 2003), sales growth (Daily & Dollinger, 1992; Gallo, Tapies & Cappuyns, 2000; Chrisman, Chua & Litz, 2004), job satisfaction (Beehr, Drexler & Faulkner, 1997), innovation (Tanewski, Prajogo & Sohal, 2003) and lately, social responsibility (Deniz & Cabrera, 2005; Dyer & Whetten, 2006).

While only a few theoretical and empirical studies that analyze social responsibility in family businesses have been published, there are strong positions found among researchers and academics if truly families small and medium-sized enterprises (SMEs) implement social responsibility activities (Dyer & Whetten,

2006). For this reason, Mörck and Yeung (2004) concluded that family businesses are commonly very interested in protecting their interests; in the best possible way, families who have several companies usually do not have much interest in supporting social activities of philanthropy. Moreover, there is much corruption in this type of companies and usually do not to provide real information to government authorities to protect their interests (Dyer & Whetten, 2006).

On the other hand, there are other researchers and academics, for instance Godfrey (2005), who believe that family businesses have a series of incentives so that they can be socially responsible, such as maintaining a good image with customers and consumers and therefore preserve a positive reputation with its suppliers, which can generate social protection not only for the company, but for the same family in crisis times. In addition, this kind of family SMEs have a high importance in society and economy any country (Gersick, Davis, McCollom & Lansberg, 1977; Neubauer & Lank, 1998; Dyer, 2003; Chua, Chrisman & Steier, 2003), since they represent around 60% of the total number of enterprises and provide a little more than 60% of the gross national product (Déniz & Cabrera, 2005).

Despite the importance that family SMEs have, there are relatively few theoretical and empirical studies that analyze the nature and operation of such organizations, even though this kind of companies are considered relevant in terms of the behavior caused by an interrelationship between the family and the business system (Gersick *et al.*, 1997; Chau, Chrisman & Sharma, 1999). Therefore it is necessary to perform a greater number of studies that consider the family as a basic variable that will help to build a more robust theory, which can be generalized to larger organizations' sector: family businesses (Dyer, 2003). Besides, a greater investigation is missing on which the different types of behaviors among family companies can be identified, including social responsibility (Déniz & Cabrera, 2005).

In this context, the main contribution of this empirical study is the analysis of Corporate Social Responsibility (CSR) in family enterprises in an emerging country, as it is the case of Mexico. Another contribution is the methodology used, since a structural equations model will be used to test the proposed theoretical model. The rest of the work has been organized in the following manner; the second section presents the theoretical framework, the few empirical studies previously performed and raised the research hypothesis; the third section describes the methodology employed, sample, and used variables. The fourth section discusses results and, finally, fifth section presents the main conclusions and discussion of the work.

## Materials and Methods

In business science and management literature there is no clear consensus among researchers, academics and practitioners about the concept of family business (Deniz & Cabrera, 2005), but there is consensus among this group of researchers that a family business is a single business unit, which is strongly influenced by a family group that poses management, control and succession of the company, and usually formulates and implements objectives, strategies and structure (Neubauer & Lank, 1998; Chau *et al.*, 1999). Family businesses commonly do not have a relationship with their suppliers as any other type of company, because it is more narrow and specific, in fact its suppliers can be part of their same family group (Cabrera & Dénez, 2001), by which family businesses can be strongly influenced by the confidence generated from the vendors (Huse, 1998).

In this sense, social responsibility that may exist between family enterprises and their key suppliers can be considered from two essential perspectives. The first, closely associated with family businesses with certain characteristics and behaviors specific of this type of companies, such as nepotism, putting the interests of the family above interests of the company, and excessive expenditure of the profits generated by the business rather than reinvest in itself, difficulties to adapt itself to market requirements and needs; and no preparation for succession of the old generation that holds the power of the organization (Landsberg, 1988; Handler & Kram, 1988; Danco, 1992; Gallo & Melé, 1998; Neubauer & Lank, 1998).

This kind of attitudes and behavior that regularly family businesses have, may be on the basis of the business interests protection, of the experience and results that the business have, or by other interference from businesses and society in the same organization (Dyer & Whetten, 2006). In consequence, family business commonly have amoral dynamics influenced by the family controlling the business, which hardly allows them to be socially responsible, as they focus more on protecting their interests, more because there is usually much nepotism that affects considerably its employees and suppliers, that in result hinders him largely its participation in market and in gaining social benefits (Rosenblatt, de Mike, Anderson & Johnson, 1985; Schulze, Lubatkin, Dino & Buchholtz, 2001).

Whereas, Lubatkin, Ling and Schulze (2002) concluded in their investigation that there is a clear lack of commitment of some workers in family enterprises, which represents a limiting factor in the distribution of work in the organization, which leads to not to guarantee a minimum standard of living for workers who do not belong to the family group. There are also other investigations suggesting that workers, who are not members of the family, have more disadvantages than those which belong to the family having the power of the family business, because normally regularly members of the family have a rapid promotion and an increase in the responsibilities (Beehr *et al.*, 1997; Poza, Alfred & Maheshwari, 1997), higher economic compensation (Astrachan & Kolenko, 1994;) Reid & Adams, 2001), and improved security at work (Cromie & Sullivan, 1999), than those workers who do not belong to this family group.

In a more recent study, Mörck and Yeung (2004) analyzed in greater depth family businesses from 27 industrialized countries, correlating the concentration and control of companies by a family with several variables of social progress, as for example the economic development, physical infrastructure, system health, education, the quality of policies and government programs, and social development. Coming to the conclusion that in countries that have higher percentage of large companies controlled by a family have a greater number of variables and are more socially responsible. While countries that have a high percentage of small companies controlled by a family have poor infrastructure, medical services, education and hardly socially responsible.

The second perspective of social responsibility in family businesses can be derived from investigations published in the literature associated with certain types of values, such as, product quality, respect and protection of workers and employees, involvement with the community in which the company is located, the commitment of the family to improve the business financing, continuity and integrity in policies application, improving business reputation, long-term business-oriented, respect for tradition and values of the family, among others (Donnelly, 1964; Ward, 1987; Leach, 1993; Poza, 1995; Neubauer & Lank, 1998; Miller & Le Breton-Miller, 2003).

Several researchers and scholars have considered that if family businesses succeed in these special features, they may then constitute a clear competitive advantage for this type of organizations, by providing them with specific resources and capabilities that would be very difficult to be imitated by their main competitors (Ward, 1999; Habbershon & Williams, 1999; Cabrera, De Saá & García, 2001). There are also many family businesses, which commonly have their facilities in places where families are originally from, usually these are located next to hospitals, churches, parks, or schools, and regularly contribute with economic resources to community-based activities where they belong originally (Ward, 1987; Lansberg, 1999; Graafland, 2002; Gnan & Montemerlo, 2002).

All this type of philanthropic activities that performs a large number of family businesses, usually is based on a system of values and an inherent system of volunteer work that involves providing significant economic resources, but which at the same time has a social, personal, and sometimes financial reward (Gersick, 2002). However, it is not very common among family companies the creation of specific foundations for philanthropic support, rather such enterprises devote an important part of human and economic resources for the support of various social activities according to the principles and values prevailing in the family group that controls the organization (Graafland, 2002).

Additionally, this second perspective establishes that family businesses can be socially responsible, since this type of organization also made regular activities that benefit society in general, and not only activities that entail an economic benefit to the business (Chua *et al.*, 1999). This kind of behavior was analyzed by Graafland (2002), in family businesses in Germany, identifying that there is a positive and significant relationship between actions that add value in the long-term and the activities of social responsibility. In addition to family businesses are socially more responsible than non-family companies, but only on those with more than 100 employees. Therefore, family businesses in Germany are probably more focused on reducing costs as a survival factor than on developing social responsibility activities (Ahmed, Montagno & Flenze, 1998).

Recently published papers in the literature, for example, Whetten and Mackey (2005) and Godfrey (2005), provide sufficient evidence that allow to establish that family businesses are more socially responsible companies than those not controlled by a family group. Thus, Whetten and Mackey (2005) defined that family businesses have a corporate image, a positive image of their products and a strong desire to maintain a good reputation with their suppliers, which leads them to be socially responsible. On the other hand, Godfrey (2005) considered that family businesses can be socially responsible if they are capable to create an identity that provide them security protecting their products

In this sense, there is an increasing interest from researchers, academics and professionals on business management sciences to analyze with detail the identity, image and reputation of family business as factors of CSR (Whetten & Mackey, 2005). These factors have been already analyzed and discussed in detail in various theoretical and empirical studies; by a researchers and academics. These authors have concluded that these variables can describe, without a problem, the existing relationship among family businesses and CSR (Dutton, Dukerich & Arquail, 1994; Whetten & Godfrey, 1998; Gioia, Schultz & Corley, 2000; Hatch & Schultz, 2000; Davies, Chun, Vinhan da Silva & Roper, 2001; Wartick, 2002). Then, it is possible to establish the following hypothesis:

*H1: The greater level of social actions the greater level of social responsibility.*

*H2: The greater level of environmental actions, the greater level of social responsibility.*

*H3: The greater level of economical actions, the greater level of social responsibility.*

To validate the established hypotheses, an empirical investigation was carried out on SMEs in the state of Aguascalientes, México. In addition, the followed procedure followed to obtain the reference framework, consisted first in obtaining from the Business Directory System (SIEM from its acronym in Spanish). Then, a survey was applied to managers in a sample of 400 SMEs, selecting them according to a random sampling with a maximum error of  $\pm 4.5\%$  and a 95% confidence level. Interviews with managers were applied from April to June 2010. The survey collected information about the business characteristics and its incorporation of social responsibility.

Likewise, from the general directory of the 2009 (SIEM), with a total of 7,662 companies, it was possible to determine the final number of companies with 5 to 250 employees, a total of 1,342 enterprises; creating this way a sample size of 400 businesses, which represented more than 30% of the total population (1,342 enterprises). The survey was designed to be answered by managers and SMEs owners, and these were directly applied to them, in each of the 400 selected enterprises, from which 397 surveys were validated achieving a 99% response rate. From this total, 297 were considered familiar businesses and 100 as no familiar businesses, this way having a final sample of 297 enterprises for this investigation.

On the other hand, as previous step for the analysis of this research, there was a feasibility and validity analysis of the scale used. The three dimensions for Corporate Social Responsibility were: social, environment and economic, these were defined by uni-dimension scales. All items were constructed on Likert 5 scale, where the limits were 1 = completely disagree, 5 = completely agree. Fifteen items measured the social dimension, the environment dimension was measured with a scale of 7 items, and the economical

dimension was measured with a scale of 9 items. These three dimensions were adapted by the European Union (2001), Bloom and Gundlach (2001), Bigné *et al.* (2005); and Alvarado and Schlesinger (2008).

Besides, a Confirmatory Factor Analysis (CFA) evaluated feasibility and validity of the measurement scale, using the method of maximum verisimilitude and software EQS 6.1 (Bentler, 2005; Brown, 2006; Byrne, 2006). Then, feasibility of the theoretical model was evaluated by Cronbach alpha and Complex Feasibility Index, which are established by Bagozzi & Yi (1988). Besides, according to Chou, Bentler and Satorra (1991), Hu and Bentler Kano (1992) who state that in order to statistically correct the theoretical model and to provide a better statistical fit of data it should be done through robust statistical (Satorra & Bentler, 1988), specially when one considers the existence of problems with normality of data.

Additionally, adjustment indexes used were the Normed Fit Index (NFI), the Non-Normed Fit Index (NNFI), the Incremental Fit Index (IFI), Comparative Fit Index (CFI), and the Root Mean Square Error of Approximation (RMSEA) (Bentler & Bonnet, 1980; Byrne, 1989; Bentler, 1990; Hair *et al.*, 1995; Chau, 1997; Heck, 1998). Thus, Segars and Grover (1993) define that if the NFI, NNFI and CFI have on average a value between 0.80 and 0.89 it is considered that the theoretical model fits. On the other hand, if the average of these rates is equal or higher than 0.90 then there is a reasonable evidence of an excellent fit of the theoretical model (Jöreskog & Sörbom, 1986; Byrne, 1989; Papke-Shields *et al.*, 2002). Moreover, when the RMSEA value is below 0.08 the model fit is considered acceptable (Jöreskog & Sörbom, 1986, Hair *et al.*, 1995).

Table 1 presents the results obtained from the CFA that indicate that the theoretical model on CSR has good fit ( $S-BX^2 = 263.723$ ;  $df = 101$ ;  $p = 0.000$ ;  $NFI = 0.830$ ;  $NNFI = 0.836$ ;  $CFI = 0.862$ ;  $RMSEA = 0.074$ ), all items from the related factors are significant ( $p < 0.01$ ), the size of all standardized factor loads exceed 0.60 (Bagozzi & Yi, 1988), Cronbach's and IFC have a greater value of 0.70, and extracted variance index (EVI) has a value greater than 0.50 (Fornell & Larcker, 1981).

Table 1. Internal Consistency and Convergent Validity of the Theoretical Model

Variable	Item	Factor Load	Robust T value	Cronbach Alpha	CFI	EVI
Social	RSS6	0.648***	1.000 <sup>a</sup>	0.892	0.903	0.574
	RSS7	0.691***	6.130			
	RSS11	0.709***	7.328			
	RSS12	0.782***	7.598			
	RSS13	0.821***	7.723			
	RSS14	0.861***	7.833			
	RSS15	0.767***	7.546			
Environment	RSA3	0.686***	1.000 <sup>a</sup>	0.879	0.885	0.608
	RSA4	0.764***	11.843			
	RSA5	0.821***	12.603			
	RSA6	0.861***	13.081			
	RSA7	0.756***	11.726			
Economic	RSE6	0.693***	1.000 <sup>a</sup>	0.820	0.826	0.617
	RSE7	0.651***	9.780			
	RSE8	0.804***	11.539			
	RSE9	0.791***	11.435			
$S-BX^2 (df = 101) = 263.723$ ; $p < 0.000$ ; $NFI = 0.830$ ; $NNFI = 0.836$ ; $CFI = 0.862$ ; $RMSEA = 0.074$						

<sup>a</sup> = Parameters fixed to this value in the identification process

\*\*\* =  $p < 0.01$

Therefore, these values indicate that there is sufficient evidence of reliability and convergent validity that justifies internal reliability of the scale used (Nunally & Bernstein, 1994; Hair *et al.*, 1995).

In relation to discriminant validity of the intellectual property and innovation theoretical model, evidence is provided in two ways, which is presented in table 2. First of all, it presents the interval of confidence test proposed by Anderson and Gerbing (1988) that establishes confidentiality range of 95% none of the individual elements from the latent factors correlation matrix has value of 1.0. Secondly, arises the extracted variance test proposed by Fornell and Larcker (1981), which establish that the extracted variance between each pair of constructs is higher than their corresponding EVI. Therefore, according to the results obtained from both tests it is possible to conclude that both measurements present sufficient evidence of discriminant validity of the theoretical model.

Table 2. Discriminant validity of the Theoretical Model

Variables	Social	Environment	Economic
Social	<b>0.574</b>	0.021	0.020
Environment	0.088 – 0.200	<b>0.608</b>	0.025
Economic	0.082 – 0.198	0.097 – 0.217	<b>0.617</b>

The diagonal represents the Extracted Variance Index (EVI) while above diagonal the variance part is shown. Below diagonal is the correlation estimation of factors with a confidence interval of 95%.

## Results

In order to answer the hypotheses stated in relation to the theoretical model of intellectual property and innovation, a model of structural equations was applied, using EQS 6.1 software with same variables used in the AFC (Bentler, 2005; Byrne, 2006; Brown, 2006), which examined the nomological validity of the theoretical model through the test of the Chi Squared Test, which consists on comparing results obtained between the theoretical model and the measurement model, where results indicate that differences between models are not significant, which allows to define an explanation about the relationships between the latent constructs (Anderson & Gerbing, 1988; Hatcher, 1994). Table 3 shows these results in detail.

Table 3. Results form the Structural Equation Model

Hypothesis	Structural Relationship	Standardized Coefficient	Robust t value
<b>H1:</b> The greater social actions, greater the level of CSR	Social actions → CSR	0.268***	7.360
<b>H2:</b> The greater environmental actions, greater the level of CSR	Environmental actions → CSR	0.387***	12.313
<b>H3:</b> The greater of economical actions, greater the level of CSR	Economical actions → CSR	0.414***	13.918
S-BX <sup>2</sup> (df = 97) = 253.297; p < 0.000; NFI = 0.830; NNFI = 0.837; CFI = 0.860; RMSEA = 0.074			

\*\*\* = P < 0.01

Table 3 presents results of the structural equation model application, and in regards to hypothesis H1,  $\beta = 0.268$ ,  $p < 0.01$ , which indicate that social actions have significant and positive effects on the social responsibility in family businesses. For hypothesis H2 results obtained show  $\beta = 0.387$ ,  $p < 0.01$ , which indicate that the environmental actions have significant and positive effects on CSR in family businesses. Finally, in relation to hypotheses H3 results obtained,  $\beta = 0.414$ ,  $p < 0.01$ , suggest that economic actions

also has significant positive effects on the CSR in family businesses. Therefore, it is possible to conclude that social, economical, and environmental dimensions are good predictor of CSR in family businesses.

## Discussion

Generally SMEs managers/owners have respect for traditions and family values, which allows these traditions and values not the only be developed within the company as part of its organizational culture, but also support economically and with goods to all those activities that allow to reinforce or increment social traditions and values. Therefore, these actions lead to achieve a wider recognition by society members from the locations or communities where SMEs are from, to such degree be considered as socially responsible companies and as an essential part of growth and economic and social development.

At the same time, SMEs managers not only gain better business reputation from society and communities, where these are located, by producing good quality products and services and by attractive prices, but also by regularly contributing with economical resources that support communities activities which allow them to be consider as socially responsible companies. Besides, commonly families that are owners of businesses also directly participate in community activities, performing periodical actions in benefit of needed families that require support and also give a great deal of their own products to those needy.

Moreover, SMEs managers carry out philanthropic activities on regular basis also, these are often based on a system of values that agrees with the business itself, since these are located next to hospitals, schools and churches, and this type of social organizations request support to carry out its daily activities. Thus, this type of actions are widely recognized by all society members and considerably valued by entrepreneurs, because this allows the not only to reach an excellent business and product image in general, but also to be valued by society as socially responsible business.

Finally, it is necessary to declare the main limitations of this empirical investigation. The first is the scale used to measure Corporate Social Responsibility (CSR) because only three factors where contemplated. For this reason, future research would include other factors in order to corroborate present results. A second limitation is data collection since only qualitative variables were included, it would be convenient to incorporate quantitative variables in future research, this mainly to test the possibility to obtain same results.

A third limitation can be that surveys were applied only to SMEs managers/owners in Aguascalientes state, Mexico, which can result in a biased sample, mainly if different population is used; therefore, in future research it would be useful to apply this survey to SMEs customers and clients in order to corroborate the present results obtained. A fourth limitation is that only businesses with 5 to 250 employees were considered, so in future research it would be important to study businesses with less than 5 employees, in fact this represents a little more than 60% of the total number of companies, this mainly to test results obtained.

A final limitation is may be that a considerable amount of SMEs in Aguascalientes state reflected that the requested information was confidential, so data provided by the companies do not necessarily reflect the reality of corporate social responsibility that have this type of organizations. Therefore, in future research it would be necessary to include business and government chambers, business associations in order to maximize truthfulness of data.

## Conclusions

The information obtained on this empirical investigation leads to the conclusion on three main aspects. First of all, that the adoption of practices and social actions that SMEs in communities and localities in which are settled generate a higher level of social responsibility. Since philanthropic activities support

community activities, carried out by the society, have a positive impact on the image, not only on goods and on services produced by the business, but on its reputation as socially responsible. In fact, even customers and consumers, who usually belong to the same community or locality where the SMEs is located, may prefer to acquire products and services from this type of companies than from its competitors.

Secondly, it is also possible to conclude that SMEs' actions and activities to care and protect the environment in the towns or communities, on which these are located, are usually well seen by society and it can generate a good image. Since there is an increasing number of clients and consumers that prefer to acquire goods and services from those companies that promote carefulness for the environment. Then, this type of actions can lead to improve SMEs image as enterprises socially responsible, which can facilitate positioning of current and future products of the firm, specially in the mind of customers, current and future consumers, and a strong position in the own business market.

Thirdly, it is also possible to conclude that all economic actions carried out by SMEs impact not only the improvement of standard living of its employees and workers, but of its society as a whole for towns or communities, where these organizations are established, and these are widely recognized in general by society. Consequently, SMEs giving economical support to develop activities that improve economical conditions and increment the level of life in people living in the communities, where SMEs are located, can significantly increase CSR in those firms.

In this sense, these conclusions also lead a series of implications for both SMEs managers and organizations themselves. Thus, managers and/or owners commonly share the business values with the society of communities or towns in which they are located. So, values that are promoted inside the companies are very similar to those in the community or town, since usually workers and employees of such organizations are original from those communities or towns, and even SMEs owners live in the same towns and even sometimes are widely recognized and respected families by the society as a whole.

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