

momentus capital.

Supporting Healthy Communities: Our Approach to Social Impact



For questions or more information contact:
Emily Andrews at eandrews@capitalimpact.org



Our Vision.

An economic system that respects and **uplifts all peoples' right to achieve the dreams they have for themselves**, their communities, and generations to come.

Our Mission.

We help build inclusive and equitable communities by **providing people access to the capital and opportunities they deserve.**



Impact at **Momentum Capital**

We use an impact measurement approach guided by the **Social Determinants of Health** to understand how the capital and opportunities we provide are improving the **health and well-being** of the communities we serve.

Defining Impact & Results

At Momentum Capital, **social impact** refers to the **long-term changes that borrowers, communities, and other stakeholders experience or create after working with us.**

Because long-term changes can be difficult to quantify, our Impact Framework focuses on measuring the short-term and intermediate results of our work. Here at Momentum, **results** refer to **specific and measureable short-term effects that may be directly attributed to our work.**

Our Approach

Our Impact Framework leverages quantitative metrics and key performance indicators – commonly referred to as Impact Data – to understand how our work has improved the health and well-being of communities and individuals.

Some current examples of impact data are:

- ▶ Borrower demographics
- ▶ Job creation & retention numbers
- ▶ Economic & demographic information about local communities (low-income areas, etc.)
- ▶ Information about indirect audiences (customers of a small business)

Social Determinants of Health (SDOH)

Our mission, vision, and current work is aligned with and informed by **the Social Determinants of Health (SDOH)** – a widely-accepted framework that identifies social conditions that influence the health, well-being, and quality of life for individuals and communities. As a key component of our Impact Framework, **we collect and monitor impact data across the six SDOH domains listed below.**

Economic Security



Help people and businesses earn steady incomes and build wealth that allows them to meet their goals.

Healthcare



Increase access to comprehensive, high-quality health care services.

Education



Create educational opportunities that allow children, adolescents, and adults to learn and expand their skills.

Neighborhood & Housing



Create neighborhoods and stable housing environments that promote health and safety.

Healthy Foods



Expand access to healthy food options in food deserts and low-income communities.

Social & Community Context



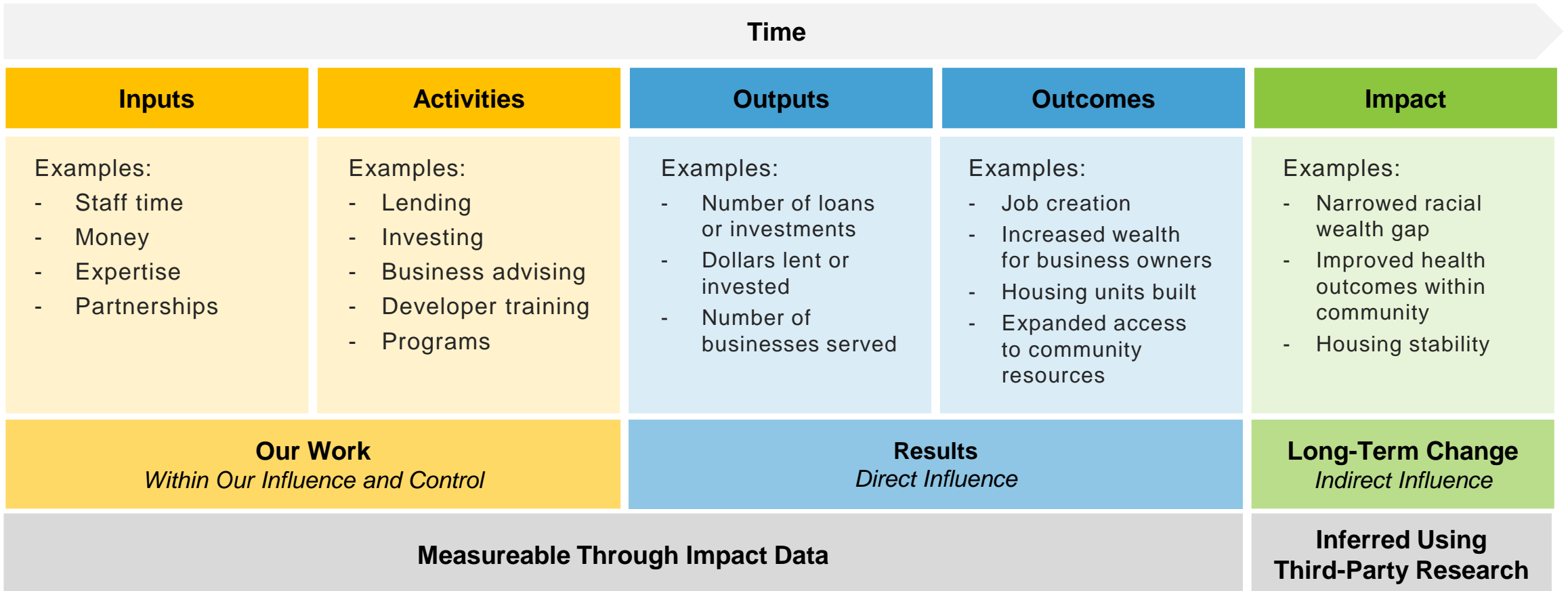
Increase access to services that build healthy, safe, and equitable communities.

Racial Equity

In addition to the SDOH, our work and impact framework is unpinned by a commitment to advance **racial justice & economic inclusion** by ensuring that all communities, regardless of demographics, have equitable access to economic security, housing, healthcare, healthy food access, education, and community resources. Through our Impact Framework, we disaggregate and track impact data by racial demographics to hold ourselves accountable to this commitment.

Measure Results, Infer Impact

The diagram below shows the causal and temporal linkage between our work, measureable results, and long-term impact. Our Impact Framework uses **impact data** to measure the short-term or intermediate effects that may be directly attributed to our work, and **rigorous third-party research** to infer the long-term social impact of our work.



Using Impact Data to Drive Decision Making

At Momentus Capital, we know that strategic thinking and innovation goes beyond data. We leverage internal impact data – paired with rigorous third-party research – to glean insights into how to best serve the communities we work in.

Below are some of the ways we use **impact data to inform our decision-making and long-term strategy**.



Institutional Learning

We use impact data to continuously improve our measurement methods and impact evaluation.



Strategy & Innovation

We use impact data to inform our strategic and day-to-day decision-making about our products, programs, and services.



Accountability & Compliance

We share anonymized impact data with government, non-profit, and private sector partners to demonstrate impact and hold ourselves accountable to our promises.



Advocacy & Policy

We use impact data and personal narratives to advocate for equitable finance policies and programs at the national, state, and local level.

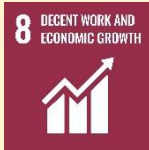
Alignment with Other Frameworks

While our Impact Framework is primarily informed by the SDOH, our focus areas are also strategically aligned with the **United Nations' Sustainable Development Goals (SDGs)**, which serve as a global blueprint for peace, prosperity, and poverty eradication.

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