PIONEER KNOWLEDGE SERVICES

CONTENTS

Executive Summary .................. 2
Programs & Results ................. 4
Financial Review .................... 5
Operations & Leadership ............ 6

APPENDIX

Key Documents ..................... 9
Charity Check Report ............... 10
MISSION

Our Vision: We Inspire Cultures That Value Knowledge as an asset.

Our core belief is that thriving organizational cultures in the 21st century will epitomize knowledge access and sharing, and this focus will be reflected in the skills and expectations of the workforce. Pioneer Knowledge Services advocates that knowledge, the accumulated intellectual resources of an organization, is that organization's most lucrative and sustainable asset.

Our Mission:
We work with organizations to enhance their ability to gather, develop, share, and make more efficient the handling of information and knowledge that will better position organizations to achieve their goals.

EIN
45-5070701

RULING YEAR
2014

IRS SUBSECTION
501(c)(3) Public Charity

FOUNDING YEAR
2012

MAIN ADDRESS
9345 Southern Belle Drive
Weeki Wachee, FL
34613

AFFILIATION TYPE
Independent Organization

CONTACT
Edwin Morris, President and Founder
(716) 501-8980
contact@pioneer-ks.org

PRESIDENT AND FOUNDER
Edwin Morris

BOARD CHAIR
Edwin Morris

SUBJECT AREA
Education

Business education

Information and communications

Leadership development

Democracy

NTEE Code
Urban, Community (S31)

Management & Technical Assistance (W02)

Economic Development (S30)
PROGRAMS

1. Because You Need to Know
   Population(s) served: Ethnic and racial groups, Academics, Domestic workers, Military personnel, Farmers

2. On Site Visit
   Population(s) served: Adults

3. Midwest Knowledge Management Symposium
   Population(s) served: Activists, Researchers, Artists and performers, Adults, Veterans, Activists, Researchers, Artists and performers, Adults, Veterans

POPULATIONS SERVED

1. Age groups
2. Ethnic and racial groups
3. Social and economic status
4. Work status and occupations

COMPLIANCE

- IRS Pub 78 Verified as of February 2024
- IRS BMF 509(a)(1) as of February 12, 2024

TRANSPARENCY MEASURES

- Board Practices Reported?
- Diversity Data Reported?
Programs & Results

PROGRAMS

Source: Self-Reported by Organization, February 2024

Because You Need to Know

Population(s) Served:
General/Unspecified

Podcast of conversations with knowledge management and nonprofit leaders. We develop knowledge by conversational and tacit elucidation.
https://soundcloud.com/pioneer-ks

On Site Visit

Population(s) Served:
General/Unspecified
General/Unspecified

Are you a nonprofit leader or worker interested in learning how your organization’s culture may benefit from knowledge management support?

Midwest Knowledge Management Symposium

Population(s) Served: n/a

The Symposium Scope and Purpose:
We aim to provide knowledge management and nonprofit learners, seekers, and people of all levels of expertise to join as we Convene the Conversations that matter.
https://sites.google.com/site/midwestkmcommunity/Home
This event serves people in the fields of knowledge management and nonprofit leadership and management. This event is for those who seek connections, trainings, and learnings that effect their organizations success.

This is for People interested in greeting the organizational future best prepared!

The Midwest Knowledge Management Symposium is a service of Pioneer Knowledge Services that is the Convener of Conversations, creating the environment that supports knowledge capture, sharing and innovating.
## Financials

Source: Self-Reported by Organization, February 2024

**FISCAL YEAR START:** Jan/1  
**FISCAL YEAR END:** Dec/31

### Revenue & Expenses

<table>
<thead>
<tr>
<th>Revenue</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions, gifts, and grants</td>
<td>$4,500</td>
</tr>
<tr>
<td>Program service revenue including government fees and contracts</td>
<td>$0</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>$0</td>
</tr>
<tr>
<td>Net Income from Special Events</td>
<td>$0</td>
</tr>
<tr>
<td>Other Revenue Amount</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>$4,500</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>$500</td>
</tr>
<tr>
<td>Administration</td>
<td>$0</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$0</td>
</tr>
<tr>
<td>Payments to Affiliates</td>
<td>$0</td>
</tr>
<tr>
<td>Other Expense</td>
<td>$0</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$500</td>
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</tbody>
</table>

### ASSETS AND LIABILITIES

| Total Assets                                  | $1,600 |
| Total Liabilities                             | $0     |
| Net Assets or Fund Balance at the end of year | $550   |
Operations

Source: Self-Reported by Organization, February 2024

PRESIDENT AND FOUNDER

Edwin K. Morris

Mr. Edwin K. Morris is the president and founder of Pioneer Knowledge Services (PKS), a non-profit organization with a charitable Knowledge Management (KM) purpose. PKS, the first of its kind in the USA, serves to educate the general public about KM and to offer services to nonprofits to build KM capacities and awareness. PKS’s mission is to inspire cultures that value knowledge. PKS is a member of the International Council on Knowledge Management.

Since spring 2015 Morris has been teaching as a part-time faculty of a 100% online required course. The class, IAKM 60301 Foundational Principles of Knowledge Management, is in the Kent State University’s Information Architecture and Knowledge Management graduate program; from which he earned his M.S. in 2012. In addition to the continued part-time faculty role for IAKM in the fall of 2016 KSU reached out to Morris to teach an undergraduate course in the School of Digital Sciences, DSCI 10010 Society, Culture, and the Digital Sciences.

BOARD CHAIR

Edwin Morris

BOARD MEMBERS

Richard Parlato
Derek Bostic
Sarah Hampton
Evan Shenkman
## STAFF

<table>
<thead>
<tr>
<th>Staff Type</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Staff</td>
<td>Mark Strausbaugh</td>
<td>Treasurer</td>
</tr>
<tr>
<td>Senior Staff</td>
<td>Edwin Morris</td>
<td>President and Founder</td>
</tr>
</tbody>
</table>
Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

Leadership

*The organization's leader identifies as:*

*No data*

Race & Ethnicity

*No data*

Gender Identity

Transgender Identity

*No data*

Sexual Orientation

*No data*

Disability

*No data*
# Appendix

## Key Documents

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>IRS Forms 990</td>
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</tr>
<tr>
<td>IRS Forms 990T</td>
<td>Not Available</td>
</tr>
<tr>
<td>Audited Financial Statements</td>
<td>Not Available</td>
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</tbody>
</table>

## Key Organization Documents

- [Letter of Determination](#)
**PIioneer Knowledge Services**

9345 Southern Belle Drive  
Weeki Wachee, FL 34613

- Foundation Status Code: PC*  
- Public charity described in section 509(a)(1) or (2)

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**IRS Publication 78 Details**

<table>
<thead>
<tr>
<th>Organization name</th>
<th>Location</th>
<th>Most recent IRS Publication 78</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pioneer Knowledge Services</td>
<td>Weeki Wachee, FL</td>
<td>February 2024</td>
</tr>
</tbody>
</table>

**EIN** 45-5070701

**Deductibility status description**  
A public charity (50% deductibility limitation).

**Reason for Non-Private Foundation Status**  
Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

**Ruling date** 07/2014

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This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

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On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization.

* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

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**GuideStar Charity Check Data Sources**

- GuideStar acquires all IRS data directly from the Internal Revenue Service.
- IRS Publication 78 (Cumulative List of Organizations) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.
- IRS Internal Revenue Bulletin (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRB, the IRB list will reflect the most recent release date of IRS Publication 78.
- The IRS Business Master File (BMF) lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.
- The IRS Automatic Reversion of Exemption List contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.
- The IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required BMF data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).
- The Office of Foreign Assets Control (OFAC) Specially Designated Nationals (SDN) list organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.

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