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**Objective:** To bring civil dispute parties to the table to resolve issues at the lowest level and cost.

**Summary of Qualifications:** Over 30 years of Federal Government experience in mediating disputes.

**Educational Background:** Bachelors of Business Administration in Accounting – Texas Southern University

**Eligibility:** EEO Counselor and Taxpayer Advocate with the Internal Revenue Service.

**Professional Experience:**

Internal Revenue Service:  
8702 S. Gessner  
Houston, Texas 77074

05/01/2015 to 06/30/2018

**Senior Program Manager Territory 6 International Individual Compliance Offshore Voluntary Disclosure Program** - As the Senior Program Manager, I was responsible for managing the OVDP program at the Austin Campus. I provided leadership to frontline managers who were responsible for separate and distinct initiatives in the program. These initiatives included OVDP Case Building, Streamline Process, and Offshore Initiatives. During my first 10 days, I met with each manager and the key members of their teams to learn the process and procedures of the teams to evaluate whether we were effective utilizing our resources. I used the prior Operational Reviews as a baseline for the individual discussions. I worked with one of the managers who was experiencing performance and conduct issues with employees. I held a number of discussions with both the manager and Labor Relations to get guidance to resolve the issue. I also held meetings with both the employee and NTEU to resolve the issue(s) for which grievances filed. I regularly assessed the staffing needs based on discussion with the team managers and provided written briefings to the Director of Field Operations. I submitted written briefings to the Industry Director about the operations of the program and discussed the overall expectations of the program.

I also mentored the Aspiring Frontline Manager participants during their acting assignments. I held regular calls with them to assist in developing and enhancing their leadership skills.

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08/01/2014 to 05/01/2015

**Team Manager for IIC** – As the Team Manager of IIC, I was responsible for providing leadership to employees in five different posts of duty. The team consisted of both Revenue Agents and administrative assistant. I held monthly team meetings with the employees to share information about the overall future and expectations of the organization and to receive their input. I promoted an environment of inclusiveness, integrity, collaboration, and openness during individual communications with employees, and during team meetings. I performed evaluative reviews and prepared records of performance on employees, completing a workload review with each agent during the first half of this year. These reviews enabled me to develop a working relationship with each agent and to assess their strengths and weaknesses. I maintained an open door policy, discuss case development with agents on an ongoing basis, and reach out to agents in remote locations to keep them engaged. I visited agents in other locations as appropriate, following protocol for obtaining overnight travel approval. I also ensured agents comply with travel requirements and obtain proper approvals. .

I was also in a position of leadership in the Houston area through my active role in the Geographical Leadership Community (GLC). I worked with other leaders on the Joint Employee Organizations Mock Interview Cadre, providing both mock interviews and workshops on interviewing techniques for employees. I also encouraged employees to participate in Diversity Day activities. I continued to pursue my personal leadership development by reading pertinent books and articles, particularly on Distance Managers (Management?). I also attended LB&I Senior Manager Technical Training as a follow-up to the Senior Management Readiness Program training that I completed while in Taxpayer Advocate Service.

In addition to periodic team meetings with employees, I participated in the RA Manager Quarterly Meeting and shared relevant information with the agents following the call. I also promoted technical development of my employees by encouraging collaboration with Counsel and IPNs on technical issues as appropriate and encourage them to provide effective and timely feedback on OVDI certification cases. I scheduled the IPN Technical Specialists to visit my Austin agents to provide input on complex examinations. I also implemented a buddy system which pairs each agent with another team member, providing another avenue to work together to identify issues and improve return selection as well as increasing teambuilding.

I continually coached and mentored my employees through engagement meetings where I obtained their input on how to increase effectiveness and efficiency in case development both on an individual and group level. I have provided written feedback to employees on the importance of customer focus as a critical component of the Service's

policy and explained why delays in taking case actions or contacting taxpayers is unacceptable. I shared the IIC Quality Review results with his agents during a team meeting and emphasized the importance of developing an effective action plan and also of documenting case actions appropriately. I also worked with employees to prepare Career Leadership Plans and ensured all employees are offered a CLP by the end of the fiscal year. I had several employees on collateral detail assignments in support of the overall business needs of II (IIC?)

I completed the online training for Enterprise Risk Management and continually emphasize integrity and timeliness in decision-making. I appropriately advised agents regarding the scope of examinations to ensure the broadest impact on compliance achieved. I also ensured communications were appropriate and professional and would withstand scrutiny if made public. In addition, I had a team member present a workshop on statute controls in an effort to mitigate risk.

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03/15/2011 to 08/01/2014

**Supervisory Associate Advocate (Taxpayer Advocate Service)** - I served as a Taxpayer Advocate Group Manager and gained more knowledge of the Taxpayer Advocate Service developed recommendations to enhance and improve business processes and to advise the National Taxpayer Advocate. During my tenure as the manager in TAS, I managed Case Advocates who worked cases to resolve various taxpayer issues. I participated in cross functional meetings and teams to build better relationships between the IRS and the Advocates office. I was selected for the SMRP and completed all required classroom training. I worked on the national roll out of the TAS Career Focus Month which emphasized the importance of developing skills preparing employees for their next careers. I was detailed for a year to the office of the Deputy National Taxpayer Advocate to work on the rewrite and development of Exam training material for Case Advocates. I completed a detail assignment as the Local Taxpayer Advocate of the Las Vegas office for 60 days. I managed a group of TAS reviewers during a detail assignment who were located in remote offices which help develop my distant management skills. As a TAS manager, I developed a Coaching Plan for the new Lead Case Advocates in the office which showed them how to coach employees to success.

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12/31/2007 to 03/15/2011

**Revenue Agent and Revenue Agent Reviewer (Technical Service)** - As a Revenue Agent Reviewer and coordinator of the Offer in Compromise program, I identified and analyzed potential problems with the way cases were processed in the unit to focus on both internal and external stakeholder concerns. . I considered all the facts and how

they would affect internal and external customers to resolve their issues at the lowest level. As a frontline manager, I have had to identify issues of concerns by both internal and external customers and with their assistance, arrive at an agreed upon solution. . As a CPE team member, several issues arose out of the many meetings that were held and I was aware of the need to assist in resolving the problem and foster a better relationship with all involved. As a Total Quality Organization (TQO) team member, we were presented with several problems that would hinder an organization from functioning properly and we came up with several solutions to those potential problems. These included the way we administered the tax law and the importance of assisting our external customers in understanding the law. As the Revenue Agent on this team, I shared my experience, which included how I kept the customer aware of all pending issues throughout the entire exam process. As lead instructor for Conflict Management Skills Workshop, instructor of Balance Measurement System, Classroom Instructor and EEO counselor, I partnered with the education staff and collections to build strong alliances, engage in cross-functional activities; collaborations across boundaries and found common ground with a wide range of stakeholders in formulating policies. This also helped resolve conflicts and disagreements in a positive and constructive manner. As an EEO counselor, I identified and analyzed problems, gathered facts and presented potential solutions for all parties involved. As a Revenue Agent Classroom Instructor for Units I, II, III and IV, I analyzed participant problems and provided a solution to meet their concerns.

I was one of four senior reviewers on the Quality Review Staff and provided written and oral feedback and technical advice to Revenue Agents, Managers and Territory Managers in both Small Business Self Employed and Large Business & International business units. During the initial review and analysis of the cases, if I determined that additional work was needed, , I prepared an written summary and sent it to the examiner and Territory Manager, explaining how I arrived at my conclusion and specifying the actions necessary to correct the case file. If I determined that no additional work was needed, I prepared a Statutory Notice of Deficiency that went to the customer to notify them of the proposed tax assessments. In every issued Notice, I provided the customer with Notice 1214, which provides contact numbers for their local Taxpayer Advocate.

As a Revenue Agent Reviewer and coordinator of the Offer in Compromise program, I developed relationships with internal and external customers to assist in the successful completion of offers made by external customers. I collaborated with Collections, the Taxpayer Advocate, Revenue Agent group managers and representatives of external customers. While assigned to the Employment Tax group I collaborated with the Excise Tax group to work a project on issues involving dyed fuel inspections to ensure that the fuel was only being used by off road vehicles.

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01/05/2005 to 12/31/2007

**Frontline Manager (SBSE Field Compliance)** - As a frontline manager, I have worked with a number of business units within the organization to get a good understanding of the overall mission of the Internal Revenue Service. This included national training of all functional employees as well as actual casework involving LMSB, Collections, TIGTA, Criminal Investigations, and the Taxpayer Advocate Office.

As a manager, I learned about the SBSE compliance programs, including pre-filing and post-filing activities. This includes the Fraud program, which is responsible for working with all other operating units to assist them in identifying and developing fraud cases. I have received over 100 hours of formal and informal Fraud training as a Revenue Agent, and used that training to identify badges of fraud in cases that I worked. For example, I worked a case involving the owner of several self-service car washes. The referral was accepted for Civil Fraud and because of the work that I completed on this case; I received a Fraud Certificate from the Fraud Coordinator. The work that I completed on several cases allowed me the opportunity to give group presentations on the technical issues involved in those cases. I have worked a number of Abusive Tax Scheme cases that had potential for fraud and developed them to assure that the taxpayers were in compliance. I am very proficient with computer software applications, including Microsoft office, and its various applications.

As a manager, I have experience dealing with the fair and equitable treatment and representation of external and internal customers. For the past 28 years, I have administered the tax law and explained taxpayer rights to both them as well as their representatives in clear and concise manner. I also volunteered with VITA through one of the Joint Employee Organizations. As a Revenue Agent, I worked several TAS cases with the last ones being Hurricane Ike Claims. I always completed timely actions to reduce taxpayer burden and throughout my career have always considered Customer Satisfaction a primary factor in creating a quality product. As a panel member during the rollout of Balance Measures, I encouraged every employee to make serving the taxpayer a priority as a method of bringing about voluntary compliance. I volunteer at my local church to provide advice to the members on how to respond to contact made by the IRS.

I have the ability to communicate both orally and in writing. As a Revenue Agent and Manager, I provide written and oral feedback on all assigned cases that clearly reflect their outcomes. I also provided written and oral feedback to frontline managers during an acting assignment working with the Territory Manager on the progress of their operational units during Operational Reviews. As a group manager, I wrote monthly briefings to the Territory Manager providing her the necessary information to assess the overall needs of my team as well as the territory.

As a group manager for two different teams, I reviewed cases and provided written feedback to the team members to emphasize the importance of quality and how it affects our external customers. For example, during my review of several cases on both teams, I identified several unnecessary delays in processing cases which had a high potential of placing burden on our external customers. I provided both oral and

written feedback to the agents informing them that was an unacceptable practice that went against one of our balanced measures. Also, as a manager, I completed performance reviews on each team member and provided timely written feedback.

As a group manager, I prepared monthly briefings based on data gathered for two separate teams that I managed and submitted those findings to the Territory Manager which provided her the necessary information to assess the overall needs of my team as well as the territory.