Forum for Congregational Life

A ministry of Duke Divinity School funded by Lilly Endowment Inc.

2027 Reflective Leadership Grants Request for Proposals

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The Reflective Leadership Grant creates protected time, thoughtful structure and trusted accompaniment for leaders to step back from daily demands, explore a significant leadership moment within their organizational context and return to their work with renewed capacity for faithful personal, organizational and communal impact.

Milestone	Date
Application opens	October 8, 2026
Applicant Q&A Session 1	October 21, 2026, 1:00–2:00 p.m. ET
Applicant Q&A Session 2	November 18, 2026, 12:00–1:00 p.m. ET
Application deadline	December 7, 2026, 11:59 p.m. ET
Award notification	February 15, 2027
Grant period	April 1, 2027–August 31, 2028
Required grantee convening	June 2-4, 2027, in Durham, North Carolina
Final report deadline	September 30, 2028

Applicants must be available for the in-person grantee convening. Reasonable convening expenses will be paid directly by the Forum and separately from the grant award.

Invitation

The Forum for Congregational Life invites applications for the Reflective Leadership Grant from established leaders serving Christian, tax-exempt 501(c)(3) organizations in the United States. The program supports leaders whose work has made a demonstrable contribution to their organization's mission and who now face an adaptive challenge: a significant opportunity, tension, transition or recurring concern that cannot be resolved through expertise, routine procedures or a technical fix alone.

The grant supports up to $20,000 for an intentional process of structured reflection connected to the applicant's current organization and ministry. The process should help the leader understand what is happening beneath the presenting issue, listen carefully to the people and systems involved, test faithful responses and learn from the results. Personal renewal and formation matter within this process, but they are not the grant's sole or final purpose. The proposed work must also be oriented toward the organization and the communities it serves.

Applicants are not expected to know in advance what their reflective time will reveal. A strong proposal names why this is a pivotal moment, identifies the questions that require sustained attention and designs a credible process for observation, interpretation, experimentation and integration. The grant is intended to cultivate faithful learning, not reward a predetermined answer.

The Reflective Leadership Framework

At the heart of the program is Ronald Heifetz and Marty Linsky's "Leadership on the Line: Staying Alive through the Dangers of Leading," whose ideas help leaders take on hard challenges while staying resilient, grounded and effective over the long haul. Before you begin your narrative application, we invite you to explore this framework through the book's opening chapters. Whichever you choose, you'll come away with language and ideas that can deepen your application and carry into the cohort experience and advisory-group conversations.

The Movement Between Balcony and Dance Floor

Reflective leadership is not a one-time retreat from action. It is a repeated movement between gaining perspective and leading within the work. Grant plans should model this cycle:

1. ***Step back from the dance floor to the balcony***. Create enough distance from immediate demands to observe patterns, relationships, competing values and the larger organizational system.
2. ***Return to the dance floor and make an intervention in your current ministry context.*** This might be a difficult conversation, a small experiment, a change in practice or a decision you've been weighing.
3. ***Observe the impact.*** Pay attention to what changes, what does not, how people respond and what new information becomes visible.

4. ***Return to action with deeper learning***. Interpret what has been learned, revise assumptions and determine the next faithful intervention.

Applicants may move through this cycle several times during the grant period. The goal is not to remain on the balcony, but to develop a durable practice of reflection alongside action.

Structured Reflection and Adaptive Leadership

Structured reflection is protected and intentional time for a leader to step back from daily responsibilities, observe patterns, explore significant questions, encounter new perspectives and discern what faithful leadership may require next. It may include individual and communal practices, but each activity should be connected to a question, a method of learning and a plan for returning insight to the organization.

Technical challenges may be addressed through existing knowledge, expertise or procedures. Adaptive challenges require people to learn, examine assumptions, negotiate competing values and change practices or relationships. A proposal may include technical activities, but it should explain how those activities support engagement with the deeper adaptive challenge.

Questions to Guide Your Time on the Balcony

Stepping onto the balcony means pausing the action to see the bigger picture, like watching a dance from above instead of participating in the dance itself. The following questions and practices will help you decide what to notice, what questions to ask and what responses to try. They are adapted from the “Leadership on the Line” framework.

What Is Going On Here?

Move beyond the most visible problem. Observe recurring patterns, relationships, histories, values, losses, pressures and possibilities within the organization and its community.

Distinguish Technical and Adaptive Challenges

Identify which parts of the situation can be addressed through expertise or established procedures and which require learning, changed behavior, new relationships or a reexamination of values and assumptions.

Find Out Where People Are

Listen to the people affected by the challenge. Learn what they value, fear, hope for, resist or believe is at stake. Listening sessions, interviews, facilitated conversations and stakeholder mapping may support this work.

Listen to the Song Beneath the Words

Attend not only to what people say, but also to patterns, emotions, absences, contradictions and unspoken concerns. A professional coach, spiritual director, advisor or facilitator may help

the leader interpret what is being heard without being limited by personal bias or a preferred explanation.

Read Authority Figures for Clues

Observe how people with formal or informal authority frame the issue, respond to pressure, allocate attention and signal what may or may not be discussed. Consider what these responses reveal about the wider system.

The Pivotal Moment

A pivotal moment is a meaningful inflection point in the life of an organization and its leadership. It may involve an opportunity, transition, tension or recurring concern that makes continued business as usual insufficient and calls for sustained reflection. The pivotal moment is the catalyst for balcony time; it is not a predetermined decision or guaranteed organizational change.

Proposals that are focused mainly on the applicant's job search, personal career transition or exploration of work outside the current organization are not a fit. If a leadership transition is part of the organizational challenge, the proposal should explain its significance for the organization, identify those affected and describe how those people will be heard or included appropriately.

What the Grant Supports

Grant activities should create perspective, generate learning or make reflective practice possible. Each proposed activity must be connected to the applicant's adaptive challenge, guiding questions and organizational context. Eligible expenses may include:

- Protected time away from ordinary responsibilities — whether in an extended block or recurring shorter periods — that is structured around clear questions and practices of reflection
- Listening sessions, interviews or facilitated conversations with core stakeholders
- Professional coaching, spiritual direction, consultation or accompaniment by a trusted advisor
- Site visits to organizations or leaders whose experience can illuminate the applicant's questions
- Conferences, seminars or learning experiences that offer relevant perspectives beyond the applicant's usual context
- Books and materials directly related to the reflective process
- New practices or behaviors designed to test emerging learning

- Salary support, temporary coverage, childcare or senior care necessary to protect the applicant's reflective time

Extended leave, travel or conference attendance are not sufficient by themselves. The proposal must explain how the activity will produce observation, interpretation, discernment or integration within the applicant's organization.

What the Grant Does Not Support

The Reflective Leadership Grant is not intended to fund a traditional sabbatical, general vacation, an academic degree, an independent research project, a memoir, a book manuscript, an online course or other product-development project. Rest, reading, writing, travel and learning may be included in the proposal when they serve a clearly articulated process of reflective leadership within the applicant's organizational context. Proposals centered primarily on unrestricted leave, academic requirements, scholarly production, personal enrichment or career exploration are not eligible.

For clergy sabbatical support, please visit Lilly Endowment Clergy Renewal Programs.

For support for scholarly research in Christian faith and life, please visit Louisville Institute.

Eligibility

An eligible application must meet all of the following requirements:

- The applicant is an established leader of a Christian, tax-exempt 501(c)(3) charitable organization.
- The applicant's leadership and the majority of the organization's work are based in the United States.
- The organization will receive, administer and report on the grant funds as fiscal agent.
- The proposed work addresses a significant leadership moment within the applicant's current organizational or ministry context.
- The organization does not currently hold a Capacity Building Grant from the Forum for Congregational Life.
- The applicant has not received a Reflective Leadership Grant within the past seven years. Previous recipients must wait seven years from completion of their earlier grant before reapplying.
- The organization submits no more than one proposal for one leader during this cycle. A separately incorporated entity with its own tax identification number may submit its own proposal.

- ☐ The applicant can attend the June 2-4, 2027 grantee convening and participate in required advisory-group and cohort activities.

The grant is designed for Christian organizations or organizations with explicit Christian commitments whose work strengthens Christian congregations, ministries or communities. Organizations without this relationship are not eligible. Any faith-based charitable organization in the United States is eligible to apply for a Reflective Leadership Grant on behalf of an individual serving the organization.

Project Fit Checklist

This checklist is a guidance tool, not an eligibility determination or predictor of funding. Applicants who answer "no" to several questions should consider whether the Reflective Leadership Grant is the best fit for their proposed work.

- ☐ Are you an established leader currently serving a Christian, tax-exempt 501(c)(3) organization in the United States?
- ☐ Has your work made a demonstrable contribution to the organization's mission?
- ☐ Is the organization facing a meaningful opportunity, tension, transition or recurring concern that calls for deeper learning?
- ☐ Does the situation include an adaptive challenge rather than only a technical problem with a known solution?
- ☐ Can you identify important questions even if you do not yet know the answers?
- ☐ Do you need protected time and thoughtful structure to gain perspective on the organization and its context?
- ☐ Will the proposed activities support observation, interpretation, discernment, experimentation and integration?
- ☐ Is your organization prepared to protect your time and support the return of relevant learning to the work?
- ☐ If the context involves a leadership transition, have you considered how affected people will be heard or included?
- ☐ Are you willing to participate fully in the required convening, advisory groups and learning community?

Organizational Commitment and Portability

Because the grant is awarded to the organization, the organization must provide a signed letter of institutional support. The letter must be written by the organization's senior officer. If the applicant is the senior officer, the letter must come from the chair of the governing board or a comparable governing body. ***Applicants may not submit their own letter.***

Reflective Leadership Grants are not portable: If the recipient leaves the organization before or during the grant period, proposed or active grant work must stop. The organization must notify the Forum, return unspent funds and provide a final financial accounting. An applicant who leaves their organization after submitting a proposal must withdraw their application.

Program Commitments

Formational Reading

Grant award recipients will be expected to read and engage with Ronald Heifetz and Marty Linsky's "Leadership on the Line" throughout their grant project period, returning to its ideas as they plan, act and reflect. It also serves as the shared framework for the convening and the advisory group process.

Grantee Convening

Grantees must attend the in-person convening in Durham, North Carolina, from June 2-4, 2027. The convening will introduce the cohort's shared framework, strengthen each grantee's reflective design and begin the learning community. Reasonable convening expenses will be paid by the Forum, separately from the grant.

Advisory Groups

Grantees will participate in scheduled advisory group sessions during the grant period. Advisors and peers will offer accompaniment, compassionate listening, curiosity, constructive questions and practical insight. They will not prescribe an outcome for the grantee.

Advisory sessions will help grantees revisit the adaptive leadership framework, interpret what they are observing, engage uncomfortable areas of growth, connect activities to learning, create new practices and behaviors and assess the effects. Participants should arrive prepared, attend consistently and share candidly enough to support meaningful reflection.

Integration and Ongoing Practice

Grantees will be expected to document and evaluate their learning and develop practices that allow balcony time to continue after the funded period. These practices may include recurring reflection days, peer consultation, coaching, spiritual direction, stakeholder listening or a personal and organizational balcony practice plan.

Grant Amount and Period

The Forum plans to award up to 50 grants of up to $20,000 to eligible organizations. Funds will be available beginning April 1, 2027. All funded activities must be completed by August 31,

2028. The final narrative and financial reports are due September 30, 2028. Unspent funds must be returned.

Proposal Requirements

A strong proposal will present a coherent relationship among the organization's context, the adaptive challenge, the applicant's pivotal moment, the guiding questions, the proposed activities and the intended process for returning learning to action. It should demonstrate curiosity and direction without claiming certainty about the outcome.

The proposal should show how the applicant will move repeatedly between balcony and dance floor: stepping back to observe, returning to make an intervention, observing the impact and using that learning to guide further action. It should also identify the people who will accompany the applicant and the methods the applicant will use to document and integrate learning.

Selection Criteria

An interdisciplinary team of readers representing varied theological perspectives and ministry contexts will evaluate eligible proposals. Readers will consider the following criteria:

Criterion	What Readers Will Consider
Organizational context and leadership	The applicant has contributed meaningfully to the organization's mission and clearly explains the current work, community and leadership responsibility.
Adaptive challenge and pivotal moment	The proposal identifies a consequential organizational moment and distinguishes adaptive work from technical needs without claiming certainty about the outcome.
Diagnostic depth	The applicant asks meaningful questions, attends to stakeholders and authority dynamics and demonstrates readiness to look beneath the presenting issue.
Reflective design	Activities create real perspective and connect clearly to observation, interpretation, discernment, intervention and integration.
Readiness and curiosity	The applicant demonstrates openness, self-awareness and willingness to learn rather than using the grant to implement a fully predetermined project.
Organizational support	The organization will protect the applicant's time, provide appropriate coverage and support the integration of relevant learning.
Systems and community awareness	The applicant recognizes the relationships, structures, traditions and communities affected by the challenge.
Potential for faithful impact	The process could strengthen the applicant's leadership and contribute to meaningful organizational and communal impact.

Application Submission

The application will be completed through an **online form**. Applicants should assemble all materials before beginning. The platform does not permit applicants to save an incomplete application and return later. The budget worksheet and frequently asked questions will be available on the **program webpage**.

Narrative uploads must use 12-point Times New Roman font, be single-spaced and remain within the stated word limits. Applications that do not meet the eligibility or budget requirements may be removed from consideration.

Section One: Application Form

- ☐ Applicant name, email, mailing address and telephone number
- ☐ Applicant job title, start date in the role and organization
- ☐ Applicant's denominational affiliation, if applicable
- ☐ Current degree-program enrollment, if applicable, including institution, degree and expected graduation date
- ☐ Name of the program, department or ministry the applicant leads
- ☐ Legal name, tax identification information and postal address of the organization that will receive the grant
- ☐ Organization's denominational affiliation, if applicable
- ☐ Name and contact information of the senior officer or board chair providing institutional support
- ☐ Name and email of the treasurer or representative responsible for receiving and disbursing grant funds
- ☐ How the applicant learned about the Reflective Leadership Grant
- ☐ Proposal title
- ☐ Proposed start and end dates; activities may begin no earlier than April 1, 2027, and must end by August 31, 2028
- ☐ A summary of no more than five sentences identifying the organization's pivotal moment, the adaptive question and how structured reflection may support a faithful response
- ☐ Description of prior financial or time-away support for similar reflection, including how this proposal is similar to and distinct from earlier funded activities
- ☐ Disclosure of any current Forum for Congregational Life grant
- ☐ Confirmation of availability for the June 2-4, 2027 convening and required advisory group participation

Section Two: Narrative Questions

Respond to each question in a single uploaded document.

Question 1: Leadership and Organizational Context (300-word limit)

Describe the applicant's current leadership role, major responsibilities and contribution to the organization's mission. What work, program or ministry does the applicant lead? Whom does it serve, what is the impact and how is that impact measured? Include only the education and professional experience most relevant to the applicant's present leadership and this proposal.

Question 2: Adaptive Challenge and Pivotal Moment (500-word limit)

Describe the significant opportunity, tension, transition or recurring concern facing the organization. What is going on beneath the presenting issue? Which elements appear technical, and which require adaptive learning, changed behavior, new relationships or renewed attention to values? Why is this the right moment for the applicant and organization to step back? What makes continued business as usual insufficient? Applicants are not expected to know the outcome in advance.

Question 3: Balcony Assessment (500-word limit)

Step onto the balcony and look at the system as a whole. Where are the key stakeholders now, and what do they value, fear or hope for? What patterns, emotions or unspoken concerns sit beneath their words? What do formal and informal authority figures reveal about the larger system, and whose perspective is missing? If a leadership transition is involved, describe who will be affected and how they will be heard.

Question 4: Reflective Learning and Faithful Impact (400-word limit)

How might personal formation strengthen the applicant's leadership within the organization? How could learning from the grant influence organizational practices, relationships, decisions or community impact? Name one practice or habit you may need to stop doing, release or carry differently.

Section Three: Reflective Leadership Plan (800-word limit)

Show how you will move between balcony and dance floor during the grant period.

1. List your major activities. Name three to five activities and give proposed dates and locations. These might include reflection days, retreats, listening sessions, coaching, site visits and learning experiences.

2. Describe how each activity works. For each one, briefly address:

- What question or area of curiosity it explores
- How it gives you distance, perspective or learning
- Who will accompany you or help you interpret what you see
- How you will document your learning
- What action may follow, and how you will observe its impact

3. Show how the pieces connect. Explain how learning will be shared with your organization and (when appropriate) with affected communities, and how you will sustain reflective leadership practices after the grant ends.

Section Four: Budget

Budgets must be submitted through the online application form using the required expense categories. Applicants may use the budget worksheet available on the **program webpage** to prepare their figures. Do not include expenses that will be paid by another funding source. The budget narrative must explain how each expense supports the reflective leadership plan.

1. **Personnel.** Salary or temporary staffing expenses necessary to create protected time for the applicant.
2. **Contractors.** Honoraria or fees for coaches, spiritual directors, facilitators, consultants, advisors or other contractors.
3. **Conference** and event registration. Fees for relevant learning experiences. Tuition or fees for degree programs are not allowed.
4. **Travel, accommodations and meals.** Travel may not exceed 20 percent of the total request. List locations, estimated costs and the relationship of each trip to the adaptive challenge and reflective plan.
5. **Books and other materials.** Items directly related to the proposed learning and reflection.
6. **Equipment.** Equipment may not exceed 10 percent of the total request. Identify each item and explain why it is essential and proportionate to the plan.
7. **Other.** Childcare, senior care or other necessary costs not captured above. Describe each expense clearly.

The Forum may request clarification or revisions. Grantees must obtain advance approval for changes governed by the grant agreement, including material changes to line items, activities or timeline.

Section Five: Letter of Institutional Support

Upload a signed and dated letter on organizational letterhead from the organization's senior officer. If the applicant is the senior officer, the letter must come from the chair of the governing board or a comparable governing body. The applicant may not write or sign the letter on their own behalf.

The letter should confirm:

- ☐ The applicant's demonstrated contribution to the organization's mission and the significance of the present leadership moment
- ☐ The organization's understanding of the grant's reflective and adaptive leadership purpose
- ☐ The protected time the applicant will receive and the plan for coverage or redistribution of ordinary responsibilities

- The organization’s willingness to support appropriate listening, experimentation and integration of learning
- The applicant’s availability for the required convening and advisory group sessions
- The organization’s willingness and capacity to receive, administer and report on the funds

Address the letter to Jasmine T. Okafor, Director of Reflective Leadership Support, Forum for Congregational Life, 1121 W. Chapel Hill St., Suite 200, Durham, NC 27701.

Final Reports and Evaluation

Final narrative and financial reports are due September 30, 2028. The final report should show how your understanding developed as you moved between balcony and dance floor: stepping back to observe and interpret, returning to action, assessing the effects of your interventions and using what you learned to guide further action. We value candid learning rather than a collection of success stories. Please describe what you tried, what changed, what did not and what still requires attention.

Section One: Project Summary

- Name of the grant recipient, grant recipient's current job title and organization that is submitting the report
- Titles and names of those central to your Reflective Leadership Grant
- A paragraph (4-5 sentences) summarizing what you learned from your balcony time
- Amount of funds spent in each category (see Section Three for budget categories)

Section Two: Narrative Questions

Question 1: Activities, Learning and Action (600-word limit)

For each major activity, trace the path from action to learning to action:

- What you did (note any change from your proposal and why)
- The question it addressed
- What you learned
- What you did next as a result
- What you observed afterward

A simple table or brief entries are welcome. Show how each step led to the next.

Question 2: One Trip to the Balcony and Back (450-word limit)

Tell the story of one time you stepped onto the balcony, interpreted what you saw, returned to the dance floor to act and assessed the impact. Include the people, places and action involved. Who helped you interpret what you observed, and which questions or forms of accompaniment were most useful? What assumptions changed? What required another trip to the balcony?

Question 3: Stakeholders, System and Adaptive Leadership (400-word limit)

What did you learn about where people were, what lay beneath their words and how authority figures shaped the system? Whose perspective changed your understanding? How did your view of the technical and adaptive dimensions of the challenge develop?

Question 4: Impact and Sustaining Reflective Leadership (400-word limit)

How has the grant influenced organizational practices, relationships, decisions or community impact, and what evidence supports your assessment? Which balcony practices will you and the organization continue, and what rhythms, relationships or structures will help sustain them?

Question 5: Challenges, Surprises and Unresolved Questions (300-word limit)

What did not work as expected? What surprised you? Which tensions or questions remain unresolved, and what will need continued attention?

Section Three: Financial Report

Using the financial report supplied at the time of the award, compare the approved budget with actual expenditures in each category. Funds not spent for approved purposes by August 31, 2028, must be returned to Duke University with the final report. Include "Forum for Congregational Life Reflective Leadership Grant" on the notation line of the check.

Definition of Terms

Applicant

The individual whose leadership and structured reflection the organization proposes to support. The applicant must be employed by and have a fiscal relationship with the applicant organization.

Organization

The Christian, tax-exempt U.S. charitable organization that employs the applicant and will receive, administer and report on the grant funds.

Ministry

The program, department, initiative or other area of mission-centered work the applicant leads within the organization.

Adaptive challenge

A challenge that cannot be resolved through existing expertise, authority or routine procedures alone. It requires learning, changed behavior, new relationships or renewed attention to values, identity and loss.

Technical challenge

A problem that can be addressed primarily through established knowledge, expertise, procedures or resources. A larger adaptive challenge may include technical components.

Reflective leadership

A practice of leading that makes space for observation, discernment and learning alongside action. Reflective leaders step back from immediate demands to understand patterns, examine assumptions, attend to God's activity, test faithful responses and learn from their effects.

Structured reflection

Protected and intentional time organized around meaningful questions, practices of observation and interpretation, trusted accompaniment and a plan for integrating learning into leadership.

Balcony time

A metaphor for intentionally stepping back from the immediate activity of leadership to observe patterns, explore adaptive questions and discern what faithful participation may require next. Balcony time prepares the leader to return to the dance floor with greater perspective; it is not permanent withdrawal from leadership.

Pivotal moment

A meaningful inflection point in the life of an organization and its leadership. It may involve opportunity, transition, tension or a recurring concern that makes continued business as usual insufficient and calls for sustained reflection.

Intervention

A purposeful action taken within the organization or community to test emerging understanding, surface learning or shift a pattern. An intervention may be a conversation, experiment, practice, decision or ending.

Advisor or wise guide

A trusted person who supports a grantee's structured reflection plan through accompaniment, compassionate listening, curiosity, thoughtful questions, practical insight and connections to relevant people or resources. Advisors work alongside a cohort of grant recipients and do not determine the outcome for any grantee.

Cohort

A community of grantees who move through the grant experience together. Drawing on the shared framework of “Leadership on the Line,” cohort members bring their own ministry contexts and challenges, learn from one another's questions and experiments and offer peer perspective as each person carries out their structured reflection plan.

About the Forum for Congregational Life

The Forum for Congregational Life is a connection and resource point that affirms, equips and inspires networks of Christian institutions and leaders that nurture congregations. Established in 2026 with funding from Lilly Endowment Inc., the Forum is a ministry of Duke Divinity School. From 2008 to 2025, the ministry operated as Leadership Education at Duke Divinity. For additional information, visit https://congregational.life/ or email forum@duke.edu.