

# Jokering Bodies

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## Abstract

This article brings forth the difficulties and possibilities of enacting the role of “Joker” from Boal’s (1979) Joker System—formerly called the poetics of the oppressed. The authors acknowledge jokering as an apprehensive performance of brokering, of bodies that matter and are matter, that can provoke anti-oppressive actions and reinscribe oppressions. As such, four backdrops are engaged to further the methodological, theoretical, and curricular/pedagogical force of jokering as a performance that unsettles the status quo: Latina/Chicana feminist theories used in mentoring, performance-based action research with middle-school students, professional leadership development for schools, and socio-technological analysis with theatre in online/distance education. Each example from our praxis illustrates how the roles of emerging researcher, mentor-researcher, and researcher-practitioner are performed and troubled (jokered) from different disciplinary and theoretical perspectives to foster social justice praxis and outcomes.

## Keywords

Boal, leadership, jokering, anti-oppressive curriculum and pedagogy, dialogical facilitation

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Welcome spect-actors, we are your jokers. The following inquiry performances engage the concept of the joker from August Boal's Theater of the Oppressed (TO), which he designed in part based on Paulo Freire's critical pedagogy or pedagogy of the oppressed. We — who are professors and doctoral students/candidates draw on our collaborative experiences using, learning, and participating in Theatre of the Oppressed activities (e.g., games, strategies), formats (e.g., image theatre, forum theater), and spaces (e.g., virtual, face-to-face), some of which were funded by a community engagement grant from the University of South Florida received by the first author Vonzell Agosto (aka Dr. Agosto). The overarching question that guided the development of each segment of this paper (inquiry performance) was: What does the work of joking inspire us to perform, transformatively, in our roles as facilitators, educators, and emerging scholars and mentors who are working and learning with different communities and spaces? The overarching purpose of these performances was to revive the radical potential of the Joker System while reckoning with the possibility of it aiding qualitative research(ers) in perpetuating theatres of oppression. So, sit back and do not relax as we introduce some background on the joker and the other central dialogical role in Boal's theatre, spect-actors.

## Introducing the *Difficultator*

The joker is one of the central elements of Boal's *TO*. Initially, Boal (1979) described the joker as the *difficultator*, “a trickster of sorts, consciously wielding a strategy of re-articulation to obscure easy answers and to discourage fixed identities” (Schutzman, 2006b, p. 134). Jokers can shift the style from realism to melodrama, ask characters to interpret other characters' actions, or lecture “the audience on aspects of the political environment that the protagonist (or perhaps, everyone in the scene) was unaware” (p. 134). Much like a researcher conducting qualitative inquiries, the joker was a “live theorist and pattern detector with a paradoxical vantage point,” who would do things like interview a character (p. 134). In education, the joker is the central figure responsible for facilitating in-between the educative and the performative (Dimitriadis, 2006). Thus, joking is a performance from a liminal position that can foster liminal states of affairs and roles through which others can transition (e.g., from spectator to spect-actor). Jokers can also shift to the role of the spect-actor. Despite their leadership and ability to shift as they see fit, jokers and their position of power and privilege are vulnerable to rejection (outcast, marginalization by spect-actors) and reduction to a single role (i.e., a comedian joking as in providing comic relief). In performing as the joker, one does not entirely escape the setting's reality (i.e., institutional norms of behavior), neither do researchers, educators, or mentors.

Over time, Boal distributed the work of joking among spect-actors when he added the forum theatre format in the 1960s. Spect-actors were the spectators that took the role of the actor, occupied the stage, and provided solutions “trying to bring the play to a different end (in which the cycle of oppression is broken)” (Boal, 2002, p. XXIV). Distributing the work also shifted the power dynamics of the performance. Spect-actors were encouraged to step into the scene and create solutions to overcome the presented

challenges and hold jokers accountable, and in extreme cases, replace them if they did not think they were doing a good job (Boal, 2002). Today, the joker has various responsibilities: to enact imprecise interventions, inject disorientation, and incongruity into stories (Schutzman, 2006b). The overarching and consistent purpose for operationalizing these responsibilities is “to incite critical, analytical thinking on the part of the audience” (Burlleson, 2003).

Given that the joker operates variously, that is, as a narrator who addresses the audience directly and a wild card who can jump in and out of any role in the play at any time, one might ask what guides the joker in addressing audiences and spect-actors. Or, as Schutzman (2006b) wondered, “what would happen if we revitalized the basic tenets of the joker system within contemporary TO practice?” (p. 134). We also wonder what would happen if emerging frameworks guided the joker’s basic tenets, current practices, and responsibilities. We also wonder how frameworks injecting social justice praxis could extend into the work of researchers, educators, and research mentors who, like the joker, respond to contextual factors and frames of reference brought to those performances.

Jumping in and out of the role of the joker during training allowed us to engage in debates about the role of research concerning social justice: Who is in the audience and who is/are on stage? Is the praxis or praxeology of research with humans meant to incite critical (power) analysis among volunteers and be incited in the process? We implicitly engage such questions as we consider different theoretical and contextual arrangements and relationships with varying political and affective responses: that is, participants/informants to researcher(s), researcher(s) to researcher or research assistant(s), or principal investigator(s) to Institutional Review Board(s). Next are four different scenarios wherein joking dialogically, pedagogically, and methodologically was entertained through different theoretical purviews.

## Theory in the Flesh

### *Joking as Border Crossings*

Methodologically, we (Ms. Warren and Dr. Agosto) drew on the duoethnographic approach to research, described and illustrated by Sawyer and Norris (2013), to guide our mentoring relationship. As co-developing academics, we crafted a question to explore joking in connection to our shared experiences balancing work–family studies: *How does joking help us reimagine and rehearse liberatory practice as women of color raising multiracial children while emerging as scholars in academia?* We worked this question dialogically as we considered the joker as an empowered role that would allow us to do things (much like a stage manager, emcee, ringmaster, or jester). For instance, we dialogically set the theoretical stage. We took breaks for costume changes (changing hats), befitting our overlapping roles as collaborating authors with our respective stories, apprehensions, and aesthetic images of the worlds we co-created (Boal, 1995; Linds, 1998). We paired Moraga’s (1983) theory in the flesh

(Hurtado, 2003; Moraga, 1983) with Anzaldúa's (2015) liminality (i.e., *Mestizaje*) and Boal's (1995) use of theatre games and activities to demechanize the body—our bodies—as researchers working against multiple interlocking oppressions toward anti-oppressive practices and outcomes.

According to Moraga (1983), there is danger in ranking oppressions, in failing to acknowledge the specificity of oppressions, and attempting to deal with them purely from a theoretical base and “without an emotional, heartfelt grappling with the source of our oppression, without naming the enemy within ourselves and outside of us, no authentic, non-hierarchical connection among oppressed groups can take place” (Moraga, 1983, pp. 52–53). Theory in the flesh focuses our inquiry bodily, starting “where the physical realities of our lives – our skin color, the land or concrete we grew up on, our sexual longings – all fuse to create a politic born out of necessity” (Moraga and Anzaldúa, 2015, p. 19). Living *at* the borderland, *in* the mix, is also living betwixt and between so that experiences of the flesh aid a material theorizing and spiritual activism. Through this perspective, joking bodies to resonate with theory in the flesh are involved in *reading the word and the world* (Freire and Macedo, 2005) and involved in feeling/sensing and re-creating it. For instance, we (Dr. Agosto and Ms. Warren) discussed experiences with our mothers of Latin descent who influenced how we present ourselves. In one scene played out at a 2018 conference, we performed a theme in our dialogue (chastisement to chastity) related to hair using props (Figure 1 gifted figurine from Tara to Dr. Agosto Willow Tree by Willow Tree © and Recording 1).

*Cue Sheet.* Microphone 1: Tara as Dr. Agosto's mother ranting loud mic (how could you; how dare you; what is wrong with you, wearing your hair down outside).

(Mic 2: Lavalier) Dr. Agosto (quietly responding) as Nathalie (Ms Warren) removes Dr. Agosto's hair clip and hands it to her.

*Recording 1:* Dr. Agosto and Ms Warren on hair [https://drive.google.com/file/d/15aLwWKDda\\_9ai\\_jxZX5\\_kqAPhUCjWBOE/view?usp=sharing](https://drive.google.com/file/d/15aLwWKDda_9ai_jxZX5_kqAPhUCjWBOE/view?usp=sharing)

Jokers can dynamize bodily images to move and speak, bringing abstract ideas into a story and bringing story to action through collaborative storytelling (Linds & Vettriano, 2008).

In emphasizing the demechanization of the body, Boal's joking system is a liminal (in-between) performance that aids his call for the removal of barriers to “arrive at the *poetics of the oppressed*, the conquest of the means of theatrical production” (Boal, 1979, p. x). The removal of barriers (types of borders), rather than their perforation, suggests jokers can accept and reject liminality, which further produces liminality. The perforation metaphor coupled with Boal's ideas about interpenetration means that a joker can maintain some walls, barriers, and borders. They can serve as spaces for rest and rejuvenation—until they do not. Like some teaching, mentoring, and qualitative research practices, joking is an improvisation practice within theatre of the oppressed



**Figure 1.** In the flesh: The psycho and the soma sculpted.

rather than ritualized set of performances. The power of the joker comes with pliability, or the readiness to transform as centers of power shift. Next, we discuss and theorize how we trespassed between mother/scholar/student/professor/mentor/mentee.

In theatre of the oppressed, spect-actors perform scenes from their daily lives in the tension between “the reality and the image of that reality” (Boal, 1995, p. 43). Nathalie shared how, in a story she read, a woman was speaking when she was interrupted by a White male. Her response to him was, “*I’m not finished.*” As Nathalie conveyed, the story unfolded in the corporeal engagement of gendered/raced/cultured bodies, bodily expression, action, and inaction. Perhaps individuals who live in states of liminality must also remain flexible, camouflaging and adapting their cultural practices and identities as they take on other corporeal curricular images of what is possible.

This story led Nathalie to wonder if she would say the same should the need arise. It did, and she did. Theory in the flesh leans into the more radical expression of the joker as “a trickster-like boundary dweller” who works to “link TO with all its borders” (Schutzman, 2006b, p. 144). The trickster joker we perform, like the coyote in indigenous/Native American stories (Burkhart, 2004; Denzin, 2019), perforates barriers (i.e., between researchers and participants) while also slipping on their porousness and sliding back into makeshift borders. Trickster joking ultimately aims to destroy barriers that maintain oppression and retain borders only to cross them. As students, educators, researchers, and mentors, we can learn from the woman who says, *I’m not*

*finished*, or the one who states, *I am speaking* (like Vice President of the United States, Kamala Harris, did during the V.P. debate in 2020). However, the more challenging lesson for jokers, researchers, mentors, and educators to learn when crossing relational borders is how to regulate the power of authority and concede.

When we test or cross-cultural boundaries that entrap us into rejecting other ways of being Black/Brown cultural border crossing women, we risk cultural rejection and correction. We risk others labeling us *malacostumbre* (set a bad example, spoil) and *malcriada* (rude, spoiled, ill-mannered). Joking provided us some escape from (some) models of a *good person* (woman of color, mother-scholar) and statuses depending on the power, politics, and risks involved in our attempts to educate, research, and mentor in opposition to indoctrination. For instance, we inadvertently shared stories of our multiracial/ethnic children processing questions about racial identity and race relations in the United States and our racial/ethnic and linguistic experiences in professional workplaces. The work of decolonizing education can begin at the interpersonal level with families using images within the joking system (Adam Perry, 2012).

### *Joking Children of Color (Peach, Brown) at the In-Betweenness of Race*

Ms. Warren: Dr. Agosto shared how one day, her son (approximately six years old) started examining race. She asked him what he meant when he said, "I am peach," and encouraged an open dialogue about his "peach-colored" skin. A few days later, after hearing Dr. Agosto's story, my 6-year-old nephew loudly stated, in front of my white mother-in-law and my brown children, "I'm glad I'm not brown!" I was taken aback by his remark. Although I did not recognize it at the time, hearing Dr. Agosto's reaction to her son's comment helped me formulate a constructive response. I was able to suspend judgment, take a step back emotionally, and approach this inquisitively and gracefully. In essence, I had to joker and broker bodies amid this familial space's racial and emotional politics.

This episode of joking across familial and cultural borders aided by duoethnography, was a rehearsal for political research praxis. Each scenario we shared further prepared us to joker difficult conversations and research with educators, students, and families confronted by various injustices. By joking our research statuses as *mamas*, *mistresses of ceremonies*, or *las brujas* (the witches), we rehearse the adoption and rejection of rituals and rites of passage that are culturally informed, culturally sustaining, and culturally mediated. While there are convergences and divergences between the joker, the mistress of ceremonies, and *la bruja* linked to gendered and classed histories, joking reminds us that mysticism and magic are part of the cultural repertoire from which we draw. In doing so, we take up and make space on the stage for jokers who bring *brujería* mixed with Black girl magic, "a rallying cry for girls, Black girls, Brown girls, and 'girls of color,' against coloniality" (López López and Nikey, 2020, p. 8).

The roles of the joker and researcher/scholar are political-liminal roles we can take on in ways that allow us to make the psychic trauma of the role/s (playing) visible (Holling and Calafell, 2007). Joking as the mistress, with the magic of (Black and Brown) girls/women, and as witches in familial, research, and academic contexts runs the risk of further(ing) sexualized, villainized, and glorified images. Yet, joking those images within images and narratives of what it means to conduct research and embody researcher-educator identities is seldom one of spiritual in-betweenness with enfolded, embodied, and situated knowledge or “consciousness of the borderland” (Anzaldúa, 2015). So, we run the risk.

## Joking and Urinating Engagements in Science

Although arts-based approaches are now providing the basis for case studies on leadership development (e.g., Meyer and Macmillan, 2003; Meyer and Young, 2013), researchers seldom apply such approaches with youth and members of the community that support them (an exception is Bagley & Castro-Salazar, 2012), and without scripts and rehearsal. The overuse of scripts to guide actors is contrary to improvisation and leading (beautifully) as (aesthetic) performing (English & Ehrlich, 2016). Despite science education leadership that advocates for students’ development of sociopolitical awareness for social change (Bazzul, 2015; Otoide and Alsop, 2015; Tolbert and Bazzul, 2017), most science education curriculum and pedagogy do not examine contributors to underrepresentation such as (1) race, gender, culture; (2) student voice; (3) course access; and (4) study abroad (Zeidler and Nichols, 2009). While we did not find much literature on joking in education (Howard, 2004), we found even less attention to joking science education.

The following scenario presents joking as an emerging form of arts-based action research. The scenario hinged on a lesson about the urinary system developed in an 8th-grade science class with students from groups traditionally marginalized in science-related careers (i.e., those of African American and/or of Latin descent/Hispanic). This scenario of arts-based action research addresses one of many borders explored by jokers: that of the body and the mind (Cartesian dualism). Boal (2002) notes, “in the body’s battle with the world, the senses suffer” (p. 49). Thus, the joker introduces games to demechanize the body and re-introduce participants (spect-actors) to the connection between body and mind, reinforcing the body as a powerful communicator, simultaneously causing participants to explore their relationship with their bodies as well as the bodies of others.

As the joker, Tara Nkrumah (an author) designed a lesson on science, social justice, and school policy over four class periods (50 min each)—brainstorming, group work, lecture, forum theatre (Figure 2), and creating an action plan from a reflexivity journal, written lesson plans, artifacts, and video. Here is how the lesson unfolded, according to Tara.

1. List what comes to mind when you see the word oppression.



**Figure 2.** Trust Cars: Students driving cars.

I wrote their responses on the whiteboard, encircling the word oppression.

2. List the things around the school you find oppressive.

I wrote those responses too.

3. Identify which oppressive things you have experienced at school and want to address.

Several students wanted to focus on bathroom passes. Next is Tara's re-storied tale of jokering the urinary system lesson. The events describing what transpired are based on her interpretations of the artifacts, observations, and teaching reflections using forum theatre.

### *Vignette: The Catalyst for Jokering in Science*

"Excuse me, Mrs. Nkrumah, for being tardy to class," came this barely audible apology mixed in the cacophony of already seated student voices arranged in quads. Esther stood motionless a few steps into the classroom, her eyes fixed on the floor tiles in need of polishing, waiting for my next words. "Where is your hall pass?" Esther replied, "I don't have a pass because I went to the bathroom," in a defiant yet respectful tone. Almost before she spoke the last syllable, Esther's explanation was met with my reprimand to her, "Leave the room and go to detention for being tardy". The other students expressed near riotous reactions. I (Tara) heard statements such as, "It's not fair," "We don't have enough time



between classes,” “All the bathrooms except for one are locked,” and “You can’t expect me to use the bathroom once a day!” These statements made me pause to question school policies, and this event became a turning point in my career as a veteran science educator.

### *Making Science Relevant*

I stood in the classroom, absorbing students’ energized chatter—“*Wow! I didn’t know that holding pee at my age could cause me not to be able to hold it when I get older,*” and “*Did you see from the video how much urine is stored in your bladder?*” By day three of the lesson, students talked about the urinary system and how school-related policies restrained its proper function. They questioned and opined on how to confront, educate, and introduce new rules. I shared with the students a method of role-playing I wanted to utilize for that day’s lesson, and without much convincing, they agreed to participate. The approach was forum theatre, developed by Augusto Boal, which involves creating a dramatic scene using oppressive, everyday life events to find solutions and prompt dialogue/debate (Boal, 2002).

I explained how one could use this method to unpack their thoughts through a staged scene reflective of the actual situation. I shared that everyone should participate, including the “audience,” as I demonstrated how people could substitute another and step into the unfolding scene by merely exclaiming, “Stop!” and politely taking on a character’s role. As I shared the class guidelines, I could see in student’s faces change as if plotting out their involvement. I continued, “Now, there will be seven participants at any given time, with one from each category (i.e., principal, assistant principal, teacher, physician, janitor).” That day, I had my video camera set to record. Without a clear vision of what to do with the recorded scenes, I settled on using the video as a teacher’s reflection tool.

I invited the first group of student participants to sit in one of the seven desks positioned at the front of the class for the first round of forum theatre. I gave them a few moments to consider their assigned character and how they would respond to the larger audience. To protect the integrity of the conversation, we reviewed the norms for our class discussions; be respectful, actively listen, do not speak out of turn, use data, and be open-minded. Additionally, I stressed meeting the purpose of the exercise to investigate the role that both race and class might play in deciding school policies that blatantly disregard a student’s health. The problem centered on having one bathroom available for use during the school day per policy mandated by the school’s administration.

The impromptu student engagement in the forum theatre left me speechless. My apprehensions, stemming from my uncertainty about whether students would interact with maturity when discussing race and class-related topics, dissolved quickly. There was a seamless flow of students, moving in and out of the scenario and injecting threads of tension with poignant arguments or unchartered ideas. As the principal character explained, all bathrooms except for one were inaccessible due to students’ inappropriate behavior. The girl student (character) responded, “Yes, but is that fair to punish everyone for what a few bad kids do?” At one point, another girl student entered to

replace the original character and stated, “I don’t use the bathroom at school the entire day because they are never clean, and now I know that is hurting my body.” The overly talkative character of the principal began to shift uncomfortably in his chair, never responding.

The activity affected the way students questioned the defined norms of the school. Students verbally expressed their concern for the perceived discriminatory and bias acts toward certain groups through school policies. As the end of the forum theatre session neared, they asked more questions than they answered. Joking the urinary tract/bathroom restriction opened up dialogue among students on the concrete realities of privilege and oppression. I realized my hesitation to center my anti-oppressive pedagogy in the teaching of science was in part based on how I had been mechanized to teach. According to Schutzman (2006a), one enters the “pedagogical space with a set of tools, goals, data, methodologies, and expectations; we come prepared only to realize that preparedness launches but does not constitute meaning, effect, or affect” (p. 279). This reference to affect foreshadows the following scenario engaging emotion and affect in the development of educational leadership that concludes with a situation (*Playing it Out*) in which four of us authors (Agosto, Nkrumah, Bratspis, Roberts) joked a forum with school and district administrators.

## Political Theatre as Professional Development

In this segment, we (Roberts and Grosland) use concepts from *theatre of the oppressed* to consider joking as a method of professional development of administrators focused on mediating power, privilege, oppression, and emotions. We address the emotionality of political issues in education and emotional states as social displays of affect and affective states as the non-conscious experience between bodies, not fully realized but productive (e.g., change in tone, respiration, or posture) (Shouse, 2005).

Referencing the 2016 United States Presidential elections, Pressley (2016) commented that emotion, theatre, and spectating matter perilously in politics. Education is political and involves creative endeavors (political theatre), from which education policy and leadership arise. Both education policy and educational leadership influence educational realities. The diminishment of people and their emotions can take a toll on educators, students, and their families/kinfolk, as can dynamic states of emotions. For instance, within and outside of the education profession, emotions can become dynamic and described using theatrical terms, such as *the drama queen*, that perpetuate sexism and racism. “One promise of jokers as pedagogues, as leaders, is that they do not let us forget that we are a composite of characters, ideals, and fantasies, of complex emotions about ourselves and the world around us, including our apparent enemies” (Schutzman, 2006b, p. 144).

According to Boal (1997, 2008), reality is the stage that produces dialogue and pathways for freedom. In theatre, like education, all activity is political (Boal, 2008). Theatre provides a forum for discussing political issues and exploring impending emotional experiences. For instance, one can use Boal’s improvisational theatre to reveal

educators' personal beliefs about thinking and feeling and recast leadership as a disposition rather than a position (Katz-Buonincontro, 2011). For Katz-Buonincontro (2011), educators' experiences with theatre manifested intense discussions, emotions, laughter, distress, and crying. These types of social/emotional spaces are where educators can further explore risk and (un)certainty associated with trying justice-oriented practices.

Like other means of artistic expression, facilitating theatrical performance can help educators in administrative roles link their personal and professional lives (Katz-Buonincontro, 2011). Through the action of bodies, administrators can become someone who "ceases to be an object and becomes a subject" (Boal, 2000, p. 102). However, professional development in educational leadership often situates administrators as spectators, gazers, or bystanders within the political theatre, whereas joking recasts spectators as spect-actors who act and offer solutions (Boal 1997). As such, we contend that skilled jokers *read the room*—sense the subtle affective changes. Such skill would help the study of political affairs associated with educational leadership.

### *School Administrators as Jokers*

Joking is a role that administrators can practice. Jokers ask questions rather than give answers, messages, or "the truth" (see Boal, 1997). Joking is the practice of provoking dialogue to foster creativity and flexibility in response. Joking allows for administrators' repositioning as creative partners rather than technicians unprepared to serve as social justice allies. As with all (non)action, emotions are at the core as educators foreground a commitment of equality and freedom and act as community allies who lead in solidarity (Boyd, 2012) for and with those disproportionately and overwhelmingly marginalized by multiple social, political, and economic arrangements (Guinier and Torres, 2002). Facilitating topics through the lens of justice can render emotions invisible or visible. Sometimes ongoing emotions become embodied (Grosland, 2019; Wallace, 2010). Via theatre and other creative practices, emotion-laden journeys can be therapeutic in searching for justice-oriented ways to lead in the stress-inducing context of education where electronic surveillance is ever-increasing (Wallace, 2010). Political theatre as a pedagogical space can offer group praxis where modeling and role-playing allow for practice in mentoring and coaching situations. Thus, theatre can help educators, such as school administrators, increase their emotional fortitude and responsiveness to social issues. More specifically, theatre of the oppressed or "TO is potent in its ability to channel the emotions that surface in the space of dialogues that seek to analyze human suffering" (Rosa, 2009, p. 249).

### *Brokering Bodies to Dismantle Injustice*

In the political theatre of education (e.g., institutions of higher education, school districts), the educator/administrator/facilitator as a joker would broker bodies through unjust schooling rituals and practices (i.e., hyper-segregated schools, over-discipline,

high-stakes standardized tests, disproportionately Black and Native American/American Indian children in special education), and affective experiences. Joking so that educators and communities engage dialogically about the politics of education can evoke affective and emotional responses that serve as data sources supporting further inquiry (Hewson, 2007) and provide a dramaturgical rehearsal for transformative leadership.

### *Playing It Out*

As a privileged position, jokers can freeze the action to dwell in the tension of emotionally laden dialogue on politically weighty topics. As suggested in the introduction, jokers can be reluctant or apprehensive about joking bodies. In our work with educational administrators in one school district, a participant described his marginalization at work as a Black, gay man. Others jumped into the role to problem-solve based on his experience, including one of the authors (Dr. Agosto), who with some trepidation took on the role to offer another response. The man, after the forum theatre, was appreciative—stating that she captured what he had thought and felt but did not say there, then or before. Other women of color may be less inclined as jokers to play out other/others' identities. Jokers make choices. Jokers broker their bodies and others' in spaces where the real, actual, and the rehearsal for what could be are being lived and imagined in the context of power dynamics of the here and now, the past and future. As a pedagogically political act to secure justice, joking can be an exhausting and vulnerable role that places the well-being of the joker at risk and in need of a visit to the operating theatre.

### **Socio-Technological Dialogics, Diagnostics, and Dramaturgy**

This inquiry performance considers joking through a socio-technological lens. Socio-technology is the study of processes intersecting society and the use of technology to address social problems. Socio-technological arrangements within organizations are often examined using four components: task, structure, actor, and technology (Upadhyaya and Mallik, 2013). In this section, the technological focus is paired with joking as sensory experience to consider virtual communications (i.e., Internet-based interviews and distance education). The guiding question was: *How can a socio-technological lens inform joking education and education research?* This question was significant in our development during 2020 when we (the authors) moved all joking (performances) to virtual spaces during the COVID-19 pandemic.

A socio-technological perspective on Internet-based theatre and the Internet offers distance education researchers a performativity lens for examining joking alongside methodological issues of place, time, audience, liveness, eventness, and dramaturgical planning. In describing Internet theatre productions, Lavender (2017) identified creative processes associated with traditional (single site-based synchronous engagements), such as rehearsal and staging, that gets combined with the Internet (e.g.,

curating social media content). Performers and audience members can engage with the resulting production simultaneously (even when recorded) rather than at the same place. In our case, the productions are re-staged (performed with a live audience and sometimes recorded).

Pairing joking with socio-technological studies encourages epistemological pluralism by intervening in the propositional way of knowing that has become standardized in education (Turkle & Papert, 1990). The critical pedagogical roots of theatre of the oppressed can also temper the optimistic view of technology as a salve to remedy the ills of education. According to Turkle and Papert (1990), “While the computer supports epistemological pluralism, the computer culture has not” (p. 153). For example, “most people working in the field [instructional technology] are so convinced of the benefits of technology in education that they are unwilling to think otherwise” (Selwyn, 2011, p. 713). A socio-technological perspective coupled with a decolonial view of joking education and technology (i.e., distance education) allows us to deconstruct/analyze how socio-cultural values are and have become embedded in the technological systems educators and researchers use.

For some time, a range of scholars has demonstrated that the dominant canon of thought is fundamentally founded on theories produced by (White) men from Western European countries who have argued that other sources were epistemologically inferior (Grosfoguel, 2013). Further, dominant American perspectives have maintained and perpetuated this canon. As such, “elite White men control Western structures of knowledge validation, their interests pervade the themes, paradigms, and epistemologies of traditional scholarship” (Collins, 2000, p. 251). Over time, Western, bourgeois, and patriarchal values and interests have reconstructed modern science (Harding, 1993) and guided the ways digital forms of technology have become pronounced in education.

Such values permeate distance education and related research to foreground particular ways of knowing and hinder counterinsurgency. For example, studies of distance education often “rely on and promote argumentation-based ‘challenge’ models as the primary mode of discourse” (Paulus, 2006), thereby emphasizing Euro-Western values such as rationalism, hierarchy, and competition. These power/knowledge values are also evident in the pedagogy of distance education. For instance, discussion forums tend not to be structured in ways conducive to critical dialogue (Chen, 2019). In addition, “learning analytics, assessing competencies (the number of discussion boards posts, site visits, and downloads) became the data by which educators ‘knew’ students” (Natalier and Clarke, 2015, p. 68). Joking online and face-to-face can help promote dialogical interactions that deal with/in situated bodily rhythms rather than promote digital-based algorithms; to help promote sculpting rather than pasting. Qualitative researchers focused on distance education may be emboldened in the role of the joker to “reimagine the role of spatiality and materiality in the constitution of community, reassess the possible sites for subaltern politics, and reconsider the role of digital epistemologies in everyday discourse and public pedagogy” (Hill, 2018, p. 289).

Situated in the current COVID-19 pandemic, it is even more urgent to provide possibilities that help secure a more just society—one that honors pedagogical and

philosophical (i.e., methodological) pluralism. More specifically, we conclude with four entry points where the jokering system can support counternarratives through performance and provocation regardless of the proximity between bodies. (1) Black Twitter represents an example of the use of technology to produce a digital counter-public where “. . . respectability discourses are routinely engaged, critiqued, and rejected” (Hill, 2018, p. 294). (2) “The computer, with its graphics, its sounds, its text, and its animation, can provide a port of entry for people whose chief ways of relating to the world are through movement, intuition, and visual impression” (Turkle & Papert, 1990, p. 131). (3) Socio-technological liminality can be joked through improvisation to support educators/researchers and students/participants relating across distance, gaps, digital divides, and standardization.

Ontologically, jokering resides in-between performers and performances (LeVan, 2003) and is often situated in short-term arrangements where trust is built within stunted timelines of minutes and hours rather than days or weeks. Jokering and the production that supports it offers a way to diagnose and design research settings (e.g., online focus groups and interviews), namely, temporary arrangements in virtual spaces (Panteli and Duncan, 2004). The joker facilitates dialogue and movement while moving in and out of scenarios and roles. Jokering confronts problems and avoids their magical *resolution* (e.g., 144 MHz). Likewise, theatrical diagnostic work can bring creative tension and harmony to performances (e.g., teaching, facilitating, leading, researching). In researching or planning distance education, one could ask about work between and behind the scenes (set design, lighting) to enhance the dialogical process of body-language dialogue (listening, speaking, acting, viewing, sensing) to “read” the work, the word, and the world.

Dramaturgy (dramatic composition) and the work of designing and producing the sets provide a theatre/performance-based framework for translating jokering sessions, such as forum theatre, from face-to-face to an online (virtual or electronic) based education and research performances. In our current work (Agosto, Bratspis, Migueliz Valcarlos, Nkrumah, and Roberts), we have joked virtually for participants in Florida and Arizona in partnership with the Outcast Theatre Collective (description and video posted on Facebook at <https://www.facebook.com/OutcastTheatreCollective/videos/646048082939762/>).

This ensemble of actors helps us learn virtual stage management and what it takes to collaboratively script performances to be performed, deconstructed, and deformed through games, spotlighting, chatting, and other tech-based dialogical experimentation. We have decolonized our language from chat master to chat wizard and continue to joker anti-oppressive dialogue with educators, students in higher education, and community groups through collaboration. We still disagree on what and when to audio and video record during forum theatre where spect-acting is intended to reduce spectating.

## Discussion and Conclusion

Although we refer to *the joker* and jokering, we do not mean to present such performances as monolithic. These responsibilities (i.e., ethical, professional) may or may

not be *enlivened* by one person at all times, including during their engagements with data (Meyer and Macmillan, 2003). Furthermore, like researchers, jokers can (in terms of ability, capacity, willingness, and opportunity) plan with and against (competing) ethical guidelines about when it is best to do something or not: to shout “freeze,” ask for silence, seek permission to continue, or decide when to discontinue a process. Avoiding North Americans’ tendency to reinscribe hierarchical relations of power within theatre of the oppressed (Rosa, 2009), we acknowledge that researchers/jokers can play alongside other jokers and spect-actors who intervene using their games, strategies, and forms/frameworks that guide their social justice-oriented praxis. Given our experience with TO, we now offer potential lines of inquiry at the intersection of the frameworks provided and some potential mud puddles for jokers/researchers to play in.

Readers interested in Boal’s repertoire (*arsenal*) should refer to his project, *Poetics of the Oppressed*, in which he links political, historical, and ethical concerns to aesthetics. There he reflected on the growth of TO, its significance to oppression, and relationality (i.e., solidarity). Boal (2006) claimed that those participating in TO as protagonists, as *oppressed people*, “need to know not only their own oppressions but also oppressions that are foreign to them” (p. 4). In giving attention to researcher positionality that is gendered and race/ethnicized within various oppressive circumstances and structures, some of the roots of intersectionality are exposed for women of Afro and/or Latin Indigenous descent (see the work of G. Anzaldúa and C. Moraga). Potentially, researchers could be incited to view their activities as social justice praxis but also and themselves as jokers in the layered reality they are joking.

Consideration of TO through a socio-technological lens echoes ideas Boal (2006) described in his book, based on the project *Aesthetics of the Oppressed*. He claimed in that project he sought “to develop, in those that practise it [aesthetics of the oppressed], their capacity to perceive the world by means of all the arts and not only the theatre” (p. 4). We have modified his statement as follows: perceiving the world is developed through centering this poetic theatrical process on “The Word” (i.e., qualitative researchers write memos and reports); “The Sound” (i.e., qualitative researchers distort participants’/informants’ voices); and “The Image” (i.e., qualitative researchers produce or promote set design activities such as building, painting, sculpting, photographing, and developing). The socio-technological takes up and expands this aesthetic lens by linking theatre, technology, and qualitative social justice research in education through practice and critique of activities such as filming, recording, and storing information/data in password-protected Internet-based services.

Formal education aimed at preparing researchers in education, whether in face-to-face or virtual settings, is primarily a *sit-and-git* experience. Even rehearsals for conducting qualitative research using methods such as facilitating mock interviews or coding data thematically with co-researchers are constructed as emotionally detached experiences honoring psychological distance and epistemological objectivity. Given the emphasis on the body as a means of expressing emotions, the use of techniques like sculpting others’ bodies raises questions we might also consider when working with

research participants'/informants' bodies/emotions starting with this one: Are you willing to touch or be touched?

Jokers/researchers and the broader theatre of the oppressed system would benefit from further examining ableism in the methods of participation that one privileges and marginalizes. The joker could raise technological questions through a diagnostic/dialogical such as *How can sound and lighting matter when jokering research on distance education using multiple methods and modalities—universal (set) design for learning? How can learning be jokered to endarken research (Dillard, 2000; Hurtado, 2003), to amplify sensation through the use of feedback (distortion), to generate data through shadowing or using negative space?* The socio-technological lens can be combined with theatrical diagnostic work in planning jokering sessions with youth producing media on social issues such as refugee education (Dahya, 2017) or studies of e-learning (Upadhyaya and Mallik, 2013).

We see the potential for jokering in the preparation of researchers to conduct qualitative inquiries. For example, in interviews or focus groups, jokers can make the taken for granted reality difficult to accept. They can help youth and educators (i.e., researchers, administrators, instructors) express more fully the fears, desires, or anxieties that arise when sharing their experiences with social oppressions that affect (their) education. When moments of tension arise in research teams, the joker-inspired researcher could rely on performance cues and techniques to confront contention generating moments of tension. Contention amongst scholars “locates disagreement and difference as generative points of departure and coalition for its unfolding meanings and affiliations” (Conquergood, 2002, p. 137). Sometimes qualitative projects, teams, grant submission, and publications in progress fall apart or get rejected. The joker can interject the reminder that, in some cases, “the end is the beginning” (Boal, 2006, p. 6).

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