

# PhyloMeth: Syllabus

Brian O'Meara

## Phylogenetic Methods (PhyloMeth). Spring 2021

UT students may sign up at EEB 587.

Syllabus version: 10:47 AM, 24 January, 2022

Instructor: **Brian O'Meara** (bomeara@utk.edu)

Course website: <http://phylometh.info>

Office hours by appointment (and routinely available over slack as well)

**Anonymous feedback** <https://www.brianomeara.info/feedback.html>

**What you will learn** This is a modern class in phylogenetic methods. You will learn how to get data, build a tree, use comparative methods, and how to make new methods. More importantly, you will learn **why** to do all this. You will also learn some best practices – these will be annoying at first, but worth it overall.

### Requirements

- A laptop on which you can install software (have root / admin access)
  - It'll be easiest if this is a Mac; less easy is Linux; Windows will be hard
- A question and some data to answer it
- GitHub account
- Slack
- R
- And other software we'll learn about during the course

**Evaluation** Grading will be based on effort and performance. Some of the things will be harder for some students than others just given differences in what they've been exposed to so far, and I don't want to penalize students who are less skilled at R, for example. But I do require that you put in work on this class: work through the exercises, think about the papers, etc. Much of the homework is chewy, so it will take some thought to get through, and you might not be able to do all of this. That's ok. *But ask for help!*

These projects should be able to serve as the core for a dissertation chapter or published paper: still requiring more work and writing, but a solid idea with preliminary results.

**Teaching** The class is generally flipped: rather than me droning at the front of the room, you'll be given content to process at home. This material will be linked to from this syllabus. In class, talk about what was not clear from the videos about methods, and we'll dig into that. We can also work on problematic parts of the exercises (you should do most of them before class) and talk about papers.

**Covid-19** The Volunteer Creed reminds us that we bear the torch to give light to others. As Volunteers, we commit to caring for one another and for the members of the communities in which we live, work, and learn.

For your safety and the safety of your fellow student scholars, I ask that you wear a properly fitted mask while in class. This greatly reduces the transmission among residents of our community, helping to end this

surge sooner and reduce the potential for another variant. It also reduces the chance that we unknowingly pass the disease to an unvaccinated or immunocompromised individual.

Current CDC guidelines recommend using N95, KN94 or K95 masks, which are the most effective in preventing infection from the current Omicron variant. A reasonable alternative is double masking.

Almost all of us prefer to learn face-to-face in a regular classroom setting - it is the core of teaching and learning here at UT. I have structured the in-person class to maximize student learning based on previous semesters. However, as covid surges and absences increase, I will need to balance the needs of in-person students as well as those who temporarily cannot attend. In this case, I may make a class-by-class instructional decision to hold class online so that ALL students can learn together. This incidence should be reduced as covid passes.

The classroom is a shared environment: with a different group of students, or a different instructor, the class could work very differently. It is on all of us to create a classroom where everyone can feel safe, be safe, and learn. To that end, please do not impose a higher degree of risk on people than they themselves are comfortable with. If everyone in your study group is comfortable meeting outside, that's fine! If one person does not want to, do not force them. Within the classroom space, many people will be uncomfortable, and be put at higher risk, to be around people without masks. Please show consideration for each other.

If you are unwilling or unable to wear a mask, or you have health conditions that place you at a higher risk, you may attend class remotely. Students under quarantine or isolation should also attend class remotely.

**Connecting** The class discussion board is public on Slack; you will need the [Slack invite code][https://join.slack.com/t/phylo Meth/shared\\_invite/enQtOTAwMDQwMTMyODMyLTM2N2I1YmRjNzhkM2ZhYWVhMzlhMjU1YzExZTQ2MGRlYTQyMzA3YzBjYWQyYzhmNGMxYzgZOTJhZTAwYTA2NzI](https://join.slack.com/t/phylo Meth/shared_invite/enQtOTAwMDQwMTMyODMyLTM2N2I1YmRjNzhkM2ZhYWVhMzlhMjU1YzExZTQ2MGRlYTQyMzA3YzBjYWQyYzhmNGMxYzgZOTJhZTAwYTA2NzI) to join.

## Schedule

- Week 1
  - Topic: Getting ready
  - Items: R, github, unit testing
  - Instructions & exercise: Getting Started
- Week 2
  - Topic: Gathering data
  - Reading: Chapter 3 of the textbook.
  - Videos: See videos in this playlist
  - Items: Sequences, trees, name resolution, alignment
  - Exercise: Getting trees, but often easier to get the raw file instead.
  - In class: Discussion of what kinds of data you need for your questions, what kind of trees you need.
- Week 3
  - Topic: Building trees
  - Videos: Terminology, Tree space, Likelihood vs Bayes
  - Reading
    - \* Felsenstein 1978
    - \* Felsenstein 1985
    - \* Lewis 2001
    - \* Drummond & Rambaut 2007
  - Items: Likelihood; Bayes; Parsimony
  - Potential exercises (choose your own)
    - \* RAxML tutorial: Fast maximum likelihood tree inference program.
    - \* BEAST tutorials: Bayesian tree inference program, especially used for getting chronograms.
    - \* Cyverse discovery environment: Free service (thanks, NSF!) for running phylogenetic (and other) software
- Week 4
  - Topic: Building trees

- Items: Gene tree species tree; Network
- Reading
  - \* Maddison 1997: Gene trees in species trees
  - \* Heled & Drummond 2009: A method for inferring species trees given gene trees inside them
  - \* Degnan & Rosenberg 2000: Cases where the most frequent gene tree does not match the species tree
  - \* Solís-Lemus & Cécile Ané, 2016: Phylogenetic networks. A bit mathy for many students in this class, but worth introducing quartets, reticulation, and an existing method.
  - \* Hahn & Nakhleh 2016: Irrational exuberance for resolved species trees. Mind-blowing (to me) paper on why to understand trait evolution we may care about the gene trees, not the species tree.
- Class exercise: Gene tree species tree
- Week 5
  - Topic: Dating trees
  - Items: Beast, r8s
  - Reading
    - \* Sanderson, 2002: Penalized likelihood.
    - \* Drummond et al. 2006: Bayesian dating. And good paper title.
    - \* Drummond and Rambaut, 2007: BEAST description.
    - \* Beaulieu et al., 2015: One possible caveat to Bayesian dating.
    - \* Heath et al. 2015: Using fossils as tips.
    - \* Course book
- Week 6
  - Topic: Discrete character models
  - Items: corHMM, geiger
  - Video: PhyloMeth discrete characters
  - Reading (all three for Tues)
    - \* Pagel, 1999: Ancestral state reconstruction
    - \* Lewis, 2001: MKV model
    - \* O’Meara, 2012: Review of models
  - Exercise (for Thurs): Discrete data
- Week 7
  - Topic: Continuous character models
  - Items: Surface, OUwie, geiger
  - Videos: OU, BM, etc
  - Reading:
    - \* Hansen and Martins, 2006: Linking micro and macroevolutionary models. TL;DR: Table 1 shows that many microevolutionary models reduce to Brownian motion.
    - \* Felsenstein 1988: Biology behind the model.
    - \* O’Meara, 2012: Not nearly as important as the ones above, but an intro to models that shows how I think.
    - \* Course Book
      - Exercise (for Thurs): Continuous data
- Week 8
  - Topic: Correlating characters
  - Items: independent contrasts, Pagel 1994, Hansen OU
  - Reading
    - \* Felsenstein, 1985: Independent contrasts
    - \* Pagel, 1994: Pagel 94 correlation
    - \* Maddison & FitzJohn, 2015: A big problem with correlation (and other issues)
  - Exercise (for Thurs): Correlations
- Week 9
  - Topic: Biogeography and optimization
  - Reading

- \* Ronquist and Sanmartin, 2011
  - \* Ree and Smith, 2008
  - Exercise: None this week, but continue working on past ones.
- Week 10
  - Topic: Diversification and SSE models
  - Items: diversitree, hisse
    - \* Magallon and Sanderson, 2001: As an empirical paper of ages, later work has improved on this, but it has extremely clear explanations of the math behind these methods.
    - \* Maddison, FitzJohn, and Otto, 2007: The BiSSE paper. Download it as a PDF: the equations do not render in the HTML.
    - \* Maddison & FitzJohn, 2015: Already read it, but reread for this week.
    - \* Beaulieu & O’Meara, 2016: A hidden state version of the BiSSE model.
  - Exercise: Diversification
- Week 11
  - Catching up
- Week 12
  - Topic: Simulating data
  - Items: TreeSim, geiger
  - Topic: Building a new comparative method
- Week 13
  - Topic: Testing a new comparative method
- Week 14
  - Topic: Student choice
  - Exercise: make an R package based on the NSF API.
- Week 11
  - Topic: Student choice
  - Exercise: Mixed data types. [https://github.com/bomeara/phylo meth\\_mixed](https://github.com/bomeara/phylo meth_mixed).

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My goal is to have you learn. If you are having trouble with something in the course, or if there is a topic you just have to learn more about, let me know (email, office hours, online forum, etc.). Faculty often use evaluations at the end of the semester to get info from students so we can improve before the next class, but this does not help you directly. To allow the class to improve while you are taking it, I have created a site for anonymous feedback at <https://www.brianomeara.info/feedback.html> (and yes, it is really anonymous). Let me know things that are going well or poorly — both are important. I might not implement all your suggestions, but they will all be read and considered, generally the same day you submit them.

Any student who feels they may need an accommodation based on the impact of a disability should contact me privately to discuss specific needs. Please contact the Office of Disability Services at 865-974-6087 in Dunford Hall to coordinate reasonable accommodations for students with documented disabilities.

All relevant University policies (including, but not limited to, policies on academic integrity, attendance, etc.) apply to this course. In the case of any conflict between the policies in this syllabus and University policy, University policy applies. The instructor reserves the right to revise, alter, and/or amend this syllabus as necessary. Students will be notified by email of any such revisions, alterations, and/or amendments.