Department of Epidemiology
Teaching Assistant Manual

Summary of responsibilities

Department

- Regularly update information on the web site about courses that fulfill the TA requirement.
- Student Services and Business offices approve a TA letter of agreement for each course and each TA hiring, in advance.
- Prepare evaluation forms for the TA to obtain student feedback, summarize the results, share them with the TA, and place the summary in the TA's academic folder.

Course Instructor

- Prepare a letter of agreement, adapted from the Department's model, specifying TA responsibilities.
- Publish, via e-mail messages from the instructor to the EPID students distribution list, information for prospective TA's, including a date by which students must apply to serve.
- Provide prospective TA’s with the names of past TA’s to facilitate learning from previous experience.
- Hold a regular (weekly or biweekly) instructors meeting with the TA’s to discuss the progress of the course, student satisfaction and achievement, TA performance, upcoming tasks.
- Observe at least one class conducted by each TA and provide feedback and consultation. TA’s who have not previously taught at the university level will be observed during two sessions; the observer for the first of these can be another TA or any faculty member. Review of a videotape is an alternative.
- Review evaluation results with each TA and debrief her/him about the TA experience and suggestions for improving the course.

Faculty TA Coordinator (with the Student TA Liaison)

- Update the various documents and forms, including the TA Manual.
- Maintain the TA webpages
- Assist instructors in working with TA’s.
- Assist TA’s in their evaluation of the TA experience.
- Identify and respond to the concerns of TA’s in the Department.
- Arrange for a mid-semester discussion session to review TA's experiences, needs, and suggestions for Department policies and procedures related to TA's.
- Prepare the annual report on the TA training and development program.
Introduction

Graduate teaching assistants (TA’s) play vital roles in the instructional program in the Department of Epidemiology and gain experience that is invaluable for their own professional development as well. Epidemiology graduate students assist in a variety of courses, both within and outside the Department, and in a variety of roles. This manual describes the Department's policies and practices relating to teaching assistants. It is consistent with but does not include all of the material in University documents such as the “GTA Guidelines” (“The professional development of graduate teaching assistants at UNC - Chapel Hill”, Office of the Provost, September 1996). The UNC Center for Teaching and Learning (CTL, ctl.unc.edu) is an excellent resource for information about University policies and for diverse resources related to teaching in higher education. The UNC Center for Instructional Technologies (CIT) has provides information and assistance in using websites, Blackboard, and other technologies.

Most of the TA opportunities in the Department are for Principles of Epidemiology (EPID 160), the service course that provides non-majors an introduction to epidemiology to meet the SPH core requirement. This course is taught fall (classroom and Internet), spring (classroom), and summer (Internet), and uses TA’s in all semesters. Other primary sources of TA opportunities are Fundamentals of Epidemiology (EPID 168), whose primary audience is epidemiology majors; Clinical Measurement and Evaluation (EPID 170), whose primary audience is medical students and physicians enrolled in the MPH in Public Health; and the higher-level courses Theory and Quantitative Methods in Epidemiology (EPID 268), Advanced Methods for Epidemiologic Data Analysis (EPID 269), Epidemiologic Analysis of Time-to-Event Data (EPID 271), Epidemiologic Research Methods (EPID 201), and SAS and Data Management (EPID 150). Epidemiology students have also served as paid or unpaid TA's in various other courses within and outside the Department. This manual applies to teaching assistants serving with courses whose primary home is the Department of Epidemiology, even if they are cross-listed in another department. Policies for teaching assistants in courses that are primarily located in a department other than the Department of Epidemiology are set by the other department.

Teaching assistant requirement

All epidemiology doctoral students are required to have at least one semester's teaching experience with one of the Graduate Studies Committee approved courses in epidemiologic methods. This teaching experience generally involves conducting a discussion (“lab”) section with 10-20 students, or a comparable distance-learning activity, and working with the instructors on diverse aspects of the course. The purpose of the teaching requirement is to ensure that all doctoral students undergo a learning experience in effective communication of general epidemiologic concepts and methods and tutored practice in the skills and the art of teaching. These skills and their application are part of the Department’s goals in the training of an epidemiologist leading to the PhD degree. Students who have acquired comparable experience in the teaching of epidemiology prior to entry into the doctoral program may request an exemption from this requirement through the Student Services Office.

Students who have completed or obtained exemption from the teaching requirement are encouraged to obtain additional teaching experience as well as to contribute to the Department's instructional
program by serving as paid or unpaid teaching assistants. The Department's Sidney Kark Award for outstanding teaching assistants gives preference to GTAs have taught in more than one course.

Compensation or academic credit

Compensation, including salary and benefits, should be clearly described in the Teaching Assistant letter of agreement (see below). To receive payment as a teaching assistant, a student must have been deemed eligible by the Fiscal Office. If financial compensation is not available or if the student cannot accept it, the student may instead receive academic credit by registering for the course Teaching Experience in Epidemiology (EPID 257) for a corresponding number of credit hours (in this case the position is called a “Teaching Intern”). Academic credit, which is available as an alternative to financial compensation, recognizes the time and effort invested in serving as a TA and enables the student to take a lighter course load to free up other time for paid employment. Receipt of compensation or academic credit is unrelated to whether or not a teaching position is used to satisfy the TA requirement. If a TA is not able to or does not wish to receive either pay or academic credit, the course instructor is requested to provide a letter recognizing and documenting the TA's contributions.
Epidemiology courses with teaching assistants

<table>
<thead>
<tr>
<th>Course</th>
<th>Name</th>
<th>Lead instructor</th>
<th>Semester</th>
<th>Typical # of TAs</th>
<th>Apply before</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPID 150*</td>
<td>SAS and data management</td>
<td>Olshan</td>
<td>Fall</td>
<td>1</td>
<td>Mar 31</td>
</tr>
<tr>
<td>EPID 160*</td>
<td>Principles of epidemiology</td>
<td>Schoenbach / Alexander**</td>
<td>Fall</td>
<td>3</td>
<td>Mar 31</td>
</tr>
<tr>
<td>EPID 160*</td>
<td>Principles of epidemiology (on-line)</td>
<td>Shy / Alexander**</td>
<td>Spring</td>
<td>4</td>
<td>Sept 30</td>
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<td>EPID 160*</td>
<td>Principles of epidemiology (on-line)</td>
<td>Shy / Alexander**</td>
<td>Fall</td>
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<tr>
<td>EPID 160*</td>
<td>Principles of epidemiology (on-line)</td>
<td>Shy / Alexander**</td>
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<tr>
<td>EPID 160*</td>
<td>Principles of epidemiology (on-line)</td>
<td>Shy / Alexander**</td>
<td>Summer</td>
<td>1-4</td>
<td>Jan 31</td>
</tr>
<tr>
<td>EPID 168*</td>
<td>Fundamentals of epidemiology</td>
<td>Rosamond** / Rockhill</td>
<td>Fall</td>
<td>2</td>
<td>Mar 31</td>
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<tr>
<td>EPID 170*</td>
<td>Clinical Measurement and Evaluation</td>
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<td>Fall</td>
<td>2</td>
<td>Mar 31</td>
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<tr>
<td>EPID 201*</td>
<td>Epidemiologic Research Methods</td>
<td>Savitz</td>
<td>Fall</td>
<td>2</td>
<td>Mar 31</td>
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<tr>
<td>EPID 268*</td>
<td>Theory and Quantitative Methods in Epidemiology</td>
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<td>Spring</td>
<td>4</td>
<td>Sept 30</td>
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<tr>
<td>EPID 269*</td>
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<td>Fall</td>
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<td>April 1</td>
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<td>EPID 271*</td>
<td>Epidemiologic Analysis of Time-to-Event Data</td>
<td>Marshall</td>
<td>Spring</td>
<td>3</td>
<td>Sept 30</td>
</tr>
<tr>
<td>BIOS 141*</td>
<td>Quantitative Methods for Health Care Professionals I</td>
<td>Garrett</td>
<td>Fall</td>
<td>2</td>
<td>Feb 28</td>
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<td>BIOS 142*</td>
<td>Quantitative Methods for Health Care Professionals II</td>
<td>Garrett</td>
<td>Spring</td>
<td>1</td>
<td>Sep 30</td>
</tr>
</tbody>
</table>

Notes:
* Indicates that this course has been approved by the Graduate Studies Committee as suitable for fulfillment of the doctoral teaching requirement
** Indicates the instructor in charge of TA recruitment.

Which courses can satisfy the doctoral program teaching requirement

In order for a course to satisfy the Department's doctoral program requirement for teaching experience, it must be approved by the Graduate Studies Committee in respect to the nature of the subject matter of the course, the nature of the duties of the teaching assistant, and the provision of supervision and mentoring by the course faculty. In general, approval requires that the course cover a broad range of epidemiologic concepts and methods applicable to interpreting and conducting research in a broad range of topical areas. Concepts covered should include issues in defining health conditions, disease natural history, measures of frequency, association, and impact, study design, control of error, data analysis and interpretation and application should be illustrated across a range of health topics. In addition, the experience gained by the TA should include participation in course design, planning, and administration; selection and preparation of instructional materials (e.g., slides, handouts, exercises, examination questions); oral or written
delivery of instruction; direct interaction with students; and participation in evaluation of student achievement.

Information about courses approved for fulfillment of the TA requirement may be found on the Department's web site at: unc.epidemiology.us/. The table on the web site, which is updated regularly, is linked to information about duties, workload, application and selection procedures, evaluation, contract, and other information about the specific course. Accuracy of information posted about each course is the responsibility of the lead instructor for that course.

**Teaching assistant responsibilities**

University guidelines define four general classes of roles and responsibilities for teaching assistants:

- **Instructional assistants**, whose primary role is to assist the instructor for the course but rarely present instructional material themselves;
- **Teaching Associates**, who are involved in some classroom, recitation, or laboratory teaching but do not have the full responsibility of a class;
- **Teaching Fellows**, who have full responsibility, including assigning final grades, for a section of a multi-section course or, less commonly, for a freestanding course.
- **Senior Teaching Fellows**, who coordinate the activities of other TA's or who have full responsibility for a course including curricular design.

The responsibilities of TA's in Department courses fit into the “Teaching Associate” category. These responsibilities include varying amounts of assisting with course planning and design, preparing and reviewing course materials (handouts, visual aids, examples, exercises, examination questions); presenting course content (in “lab” sections, in examination review sessions, via distance learning, or on occasion to the entire class); providing assistance to individual students or small groups; reviewing homework assignments, examinations, essays, oral presentations, and class participation); as well as attending lectures, participating in course meetings, sharing course administrative duties, and facilitating communication between instructors and the class.

An important responsibility that applies to everyone who has access to students’ educational records is to know and follow the federal and University requirements regarding confidentiality of such records under the Family Educational Rights Privacy Act (FERPA). Information and certification are available at regweb.oit.unc.edu/official/training/index.html. At the bottom of the FERPA page is an online quiz through which certification is obtained.

Lead instructors of courses that use teaching assistants specify the expected responsibilities of their teaching assistants, including specific reference to attending lectures, giving lectures, preparing materials, conducting discussion ("lab") sessions, preparing examination questions, reviewing homework, papers, presentations, examinations, etc. If due to illness or other urgent necessity a teaching assistant is unable to carry out an expected duty, it is his/her responsibility to notify the lead instructor as soon as the situation becomes known and to make a serious effort, in relation to the nature of the situation, to find a suitable alternate.
Eligibility to serve as a teaching assistant

Although exceptions may be made in individual cases, in general TA's must be enrolled as graduate students and in good academic standing, must demonstrate adequate proficiency in English; must have satisfactorily completed introductory epidemiology and biostatistics courses at least equivalent to those required of epidemiology masters students in the Department and the course in which they will be teaching. (The Department may request an exception to these requirements on an individual basis from the Office of the Provost.) To serve as a TA in an advanced course the student must generally have previously demonstrated a high level of achievement in that course.

Selection and recruitment

Teaching assistants are selected by the designated instructor of the course with which they will serve, except that no graduate student may be appointed as a TA until the instructor has had oral and written communication with the applicant and can attest to his/her English proficiency. Each course will designate a date by which students must apply to serve as a TA with that course in the subsequent 12 months. This date, which must have been listed on the web page and announced via email to epidstudents@unc.edu at least one month in advance, is the earliest that the instructor will select TA’s for the following year. The announcement to prospective TA’s will specify or direct them to information about the method of application, duties and benefits, and how to communicate with past teaching assistants for that course.

At some time after the designated date, the instructor(s) will select TA’s from among all who have applied, based on the needs of the individual course. Instructors will give priority to students needing to satisfy their TA requirement if they are fully qualified to TA for the specific course. Instructors welcome inquiries from students who have a strong interest in their course and give consideration to providing TA opportunities for interested qualified students who have not yet worked with that course in preference to using the same TA's from a prior year.

Upon approval by the Department's Student Services and Business offices, the designated instructor will notify prospective TA’s of their selection and arrange to discuss the teaching assistant contract (see below) for the course before a formal letter is prepared. If arrangements are mutually agreeable, the instructor will, with approval by the Student Services and Business offices, send a letter and written agreement to the prospective TA setting out the specifics of the offer and explaining that it is contingent upon receipt of funding by the Department. The student will be asked to sign and return a copy of the letter within two weeks, which shall then commit both the instructor and TA to the letter of agreement, except for the contingency regarding availability of funding.

Teaching assistant appointment letter and letter of agreement

The Department will prepare a model appointment letter and letter of agreement for use by Department faculty employing teaching assistants. Together, the letter and letter of agreement will include sections dealing with University requirements and policies concerning remuneration, eligibility for tuition remission, payment of tuition, health care insurance, any other benefits, training requirements, and supervision and evaluation procedures. Each course will adapt this model for its own use, adding the specific responsibilities for the course, the starting and ending dates for the position, the expected number of hours required for an average week, the name of the supervisor, and any additional training requirements. The letter of agreement, including any
desired modifications, must be approved by the Student Services and Business offices before the position is offered. The letter of agreement should accompany the letter of provisional appointment. When the appointment is finalized (i.e., when funding has been confirmed), the letter of agreement should be signed by the faculty member, the TA, and representatives from the Department’s Business Office and Student Services Office, with copies will be retained by all parties.

Some epidemiology students have assisted adjunct faculty in the Department with the epidemiology courses taught for medical students. Students who have expertise in areas outside of epidemiology have occasionally obtained teaching assistantships in other departments (i.e., Maternal and Child Health, School of Social Work). In these cases the department with primary responsibility for the course is generally responsible for selection, contracting, training, supervising, and evaluating the teaching assistants.

Remuneration
An estimated number of hours per week will be listed for each TA position. The policy for remuneration is set by the Department. TA’s who will receive salary will have a student appointment on monthly payroll. The Department will endeavor to provide a salary sufficient to make the TA eligible for tuition remission and/or an in-state tuition award and supplemental health care insurance.

Training
Training of teaching assistants covers relevant University policies, relevant Department policies, general orientation to teaching, training in instructional techniques (presenting material, leading discussions, communicating expectations to students, examining and evaluation), and preparation for the specific duties listed in the TA contract for that course. Training is provided through several sources: training sessions conducted by UNC Center for Teaching and Learning (CTL), articles and books (e.g., Joseph Lowman, *Mastering the Art of Teaching*), training sessions organized by the Department, the course instructor(s), and previous TA’s in the specific course. TA’s will be informed of the resources and services available from CTL. The faculty TA Coordinator and student TA Liaison will work with CTL or the School to provide training activities suited to the responsibilities and needs of the Department’s TA’s.

Training of TA’s is the responsibility of the lead instructor for the course and should reflect the teaching responsibilities involved and the TA's past training and experience. However, it is expected that:

1. All teaching assistants will receive training concerning applicable University policies (e.g., those relating to confidentiality of students’ educational records, sexual harassment, diversity, and the Honor Code) and procedures to follow if a violation is suspected.
2. All teaching assistants will receive training and certification in the federal and university requirements under the Family Educational Rights and Privacy Act (FERPA – information and certification are available at regweb.oit.unc.edu/official/training/index.html).
3. TA’s should attend, or have attended, the basic training session presented by CTL or the School of Public Health.
4. Each course will provide an orientation for new TA’s at the beginning of the semester. Discussion should include the means for evaluation of TA performance. TA’s should be provided a copy of evaluation forms that will be used.

5. All teaching assistants will meet regularly with the course instructor(s) to discuss the progress of the course, level of student satisfaction and achievement, the TA’s performance, upcoming tasks of the TA and any questions s/he may have. In this process, faculty remain attentive to the apprenticeship role of the TA(s) and provide guidance in this learning experience which allows the student to assume the role of an associate in teaching under the supervision of the course instructor.

The faculty TA Coordinator and student TA Liaison will arrange for a mid-semester discussion session for TA’s teaching that semester to review their experiences, needs, and suggestions for Department policies and procedures related to TA’s.

**Supervision**

The lead instructor or other designated faculty member for each course that uses TA’s is responsible for providing ongoing supervision and mentoring during the appointment. TA’s meet at least every other week with the lead instructor or designated faculty member, generally as part of a regular instructors' meeting (see #5 under Training). These meetings provide an opportunity to address any problems that have arisen and to offer suggestions for how the TA can approach them. Instructors will meet with TA’s individually as needed.

The supervising faculty member will observe at least one class or session conducted by each TA and provide feedback and consultation. Each TA who has not previously taught at the university level will be observed during two sessions; the observer for the first of these can be a “peer” TA (i.e., a TA in the same or a different course), a more experienced TA, or any faculty member. Observation by a faculty member should be scheduled with the TA at least a week in advance. An evaluation form (see sample in appendix) should be used to organize the observation and feedback. The form should have been provided to the TA in advance, preferably at the beginning of the course.

If preferred by the TA and the observer, observation can be carried out through review of a videotape by the observer, with the TA present or not according to the TA’s preference. A videocamera can be borrowed from CTL, and a videocassette is available free-of-charge as part of each TA’s supplies allotment at the CTL’s Self-Service Media Lab. The videocassette becomes the property of the TA and may be viewed privately by the TA or with a consultant at CTL before (or after) review by the observer.

**Evaluation**

End-of-course student evaluations provide students the opportunity to rate their satisfaction with their TA's performance and to provide verbal feedback and suggestions. A summary of these evaluations should be available to the TA and supervising faculty member in a timely fashion. The results should be reviewed with the TA by the supervising faculty member and filed in the TA’s academic folder. TA’s are also debriefed about their TA experience by the course instructor and their suggestions for improving the course obtained.
Additional student feedback and evaluation opportunities, for example, a mid-course evaluation activity, are recommended and may be organized by the course faculty or the TA(s) themselves. Such evaluations can improve communication between the TA and her/his students, providing an opportunity to improve while the course is still in progress. In addition, lead instructors should take opportunities to solicit student opinions about TA performance and should communicate these to the TA, preserving the students’ anonymity unless the student has given explicit approval for her/his identity to be disclosed.

Recognition
Each year the Department presents the Sidney Kark Award to the TA most distinguished in his/her ability to teach and inspire other students. A copy of the nomination form is available at the EPID TA Central website (unc.epidemiology.us).

Roles of the Faculty TA Coordinator and Student TA Liaison
The Faculty TA Coordinator is a member of the Graduate Studies Committee with overall responsibility for the TA Training and Development program. The Coordinator works closely with the Student Services office. The Coordinator prepares drafts and proposed revisions for the various documents and forms, including the TA Manual. The Faculty TA Coordinator and the Student TA Liaison assist instructors in working with TA's and assist TA's in their evaluation of the TA experience (see evaluation instrument in the Appendix). The Student Liaison works with the Faculty TA Coordinator to identify and respond to the concerns of graduate teaching assistants in the Department.

The Faculty TA Coordinator, with input from the Student TA Liaison, prepares the annual report on the TA training and development program. The report is reviewed by the Graduate Studies Committee and the Chair, and submitted to the Center for Teaching and Learning. The Student TA Liaison serves as TA representative from the Department to CTL, providing input to the Center in planning and supporting TA development and disseminating information from CTL to all teaching assistants in the Department.

Appendices
• Model appointment letter
• Model letter of agreement
• Evaluation forms – of TA’s, by TA’s
• Nomination form for the Sidney Kark Award

UNCepidTAmmanual.doc