

Candidate Information



Mid-Retirement Support Navigator

Part-time and 1 year Fixed Term Contract

Closing Date: 8am on Tuesday 29th September 2026

Pack Overview

Thank you for your interest in our vacancy for a Mid-Retirement Support Navigator. We're so pleased that you're considering working for Age UK South Gloucestershire.

In this Candidate Information Pack, you'll find the following information:

- About us, our history and our links with Age UK
- The benefits of working at Age UK South Gloucestershire
- Job Description and Person Specification
- How to apply

If you have any questions about any aspect of the organisation or the role, please don't hesitate to get in touch.

About Age UK South Gloucestershire

Age UK South Gloucestershire is an independent local charity with its own locally elected board of trustees and is part of the Age UK network. We've been working in the local community to help older people for 20 years. The charity makes a positive contribution to the lives of hundreds of older people in South Gloucestershire every week. Based from our main office in Thornbury High Street, Age UK South Gloucestershire actively designs services that meet the wants and needs of local older people and their families by:

- tackling loneliness and isolation
- promoting health, wellbeing and independence
- supporting families and carers
- helping people access services and financial benefit entitlements
- enabling people to get the most out of life

We respond to more than 5,000 enquiries per year with our range of services, which include: Activity Day Centres, Befriending, Community Services Programme, Foot Care, Improving Homes and Wellbeing, Information & Advice provision, specialist Benefits Advice, and Volunteering opportunities.



Our history

1997 – Age Concern South Gloucestershire was formed.

2000 – The Age Concern Federation is founded.

2005 – Age Concern South Gloucestershire changes its legal structure to become a charitable company.

2009 – Age Concern and Help the Aged merge to form the national charity, Age UK. Then in...

2010 – ...we become an Age UK Brand Partner and trade as 'Age UK South Gloucestershire'.

Age UK South Gloucestershire will celebrate our 25th Birthday.

Our Partnership with Age UK

Age UK South Gloucestershire is an independent local charity, but we share a brand with Age UK. This trusted and well-known brand helps to open doors for us locally. Of course, we always have to deliver, but it helps to have the strength of the Age UK brand behind us.

Nationally, there are around 130 regional Age UKs, each with a defined geographical area and separate charity number.

We align ourselves with the work Age UK does nationally by supporting their campaigns, sharing reports and news stories, and using their research to underpin grant and tender applications.

Age UK also provides our local MPs with information about older people that can help drive forward local policies and influence at a national level.

Being an Age UK Brand Partner brings certain responsibilities – namely to deliver services to agreed quality standards and to subscribe to shared values of being:

- Caring
- Effective
- Enabling
- Influencing
- Innovative
- Inclusive

We are aligned with Age UK but we are still a local and independent charity. The services we deliver, the money we raise, the people we support are all in South Gloucestershire. Our Trustees are responsible for strategy, policies and legal compliance.



Working for Us

Age UK South Gloucestershire employs a team of 30 paid staff, and over 160 wonderful volunteers support its work. The organisation's culture is one that puts people first, and the charity enjoys high staff morale and good staff retention. Age UK South Gloucestershire has an active board of trustees who, as well as providing good governance, work closely with the management team on matters of strategy and direction.

What we offer our staff:

- A Living Wage for employees across the organisation.
- A commitment to a work life balance, with flexible working hours in many roles.
- A healthcare cash back plan allows employees to claim money back towards a variety of health treatments.
- An employee wellbeing scheme, providing free, confidential support, counselling, financial and legal information or video appointments with a qualified GP or Physiotherapist, 24 hours a day, 365 days a year.
- Generous life assurance up to 3 times your annual salary.
- Great shopping discounts and rewards (perfect for pay day!).
- A great working atmosphere.
- 25 days holiday per year, rising to 28 days after 3 years' service, plus bank holidays.
- Regular learning and development opportunities with funding contributions toward career developing qualifications.
- Pension scheme enrolment.



Vacancy Details

Mid-Retirement Support Navigator

30 hours per week

Working pattern to be discussed at interview

£26,227.50 per annum, pro-rata. Actual annual salary of £20,982.00 per annum

1 Year Fixed Term Contract

Are you passionate about helping people make informed decisions about later life?

Age UK South Gloucestershire is looking for a motivated Mid-Retirement Support Navigator to join our team and help establish an exciting new service supporting people as they approach mid stage retirement and navigate to make informed decisions by confidence building conversations. This is an opportunity to shape a new project from the outset. Alongside providing one-to-one tailored support, you will develop referral pathways, build relationships with partner organisations, support promotion of the service across South Gloucestershire, and play a key role in monitoring outcomes and reporting on the project's impact. This is not an advice role.

Through supportive conversations, you will help people understand their options and plan for the future, exploring topics such as further retirement planning, budgeting, housing, wellbeing, work, volunteering and future care needs. We're looking for someone with excellent people skills, experience of supporting individuals to make informed decisions, and the ability to communicate complex information clearly. You may have a background in information and advice, pensions, financial services, adult social care, housing, community support or a related field

Age UK South Gloucestershire is committed to equal opportunities and encourages applications from all sectors of the community.

If that person could be you, download an application pack from our website. Please return completed application forms to hr@ageuksouthglos.org.uk.



Closing date:

8am on Tuesday 29th

September 2026

Interviews to be held within 2 weeks
of closing date

Job Description

Job Title	Mid Retirement Support Navigator
Salary	£26,227.50 per annum, pro rata. Actual annual salary £20,982.00
Hours of work	Part-time, 30 hours per week
Working pattern	To be discussed at interview
Place of work	67 High Street, Thornbury, South Gloucestershire BS35 2AW
Annual leave	25 days annual leave (increasing to 28 after 3 years' service), plus public holidays, all pro rata
Status	Fixed Term Contract for 1 year

Job Purpose
Age UK South Gloucestershire is looking for a motivated Mid-Retirement Support Navigator to join our team and help establish an exciting new service supporting people as they approach mid stage retirement and navigate to make informed decisions by confidence building conversations.
Responsible to
Information and Advice Manager
Contacts
The post holder will build positive relationships with funders, partner agencies, Age UK National, service users, and the wider staff team within the organisation.

Key Responsibilities

This is an opportunity to shape a new project from the outset. Alongside providing one-to-one tailored support, you will develop referral pathways, build relationships with partner organisations, support promotion of the service across South Gloucestershire, and play a key role in monitoring outcomes and reporting on the project's impact. This is not an advice role. Through supportive conversations, you will help people understand their options and plan for the future, exploring topics such as further retirement planning, budgeting, housing, wellbeing, work, volunteering and future care needs. We're looking for someone with excellent people skills, experience of supporting individuals to make informed decisions, and the ability to communicate complex information clearly. You may have a background in information and advice, pensions, financial services, adult social care, housing, community support or a related field.

General Responsibilities of all Staff Members

- To ensure that all administration protocols and procedures are efficiently undertaken.
- To attend supervision sessions & other meetings as required by the CEO.
- Maintain a commitment to professional development through a combination of both formal and informal methods, including attendance at mandatory training and meetings as directed.
- Uphold the highest standards of personal conduct in all matters relating to the role, working within all policies and procedures of AUKSG.

Other Duties

This job description is intended as a guide to the general duties required of the post. The post holder may be required to undertake training and perform duties other than those given in the job description. The duties and responsibilities attached to posts may vary from time to time. Such variations are a common occurrence and would not justify the re-evaluation of a post. Where a permanent and substantial change in the duties and responsibilities occurs, then the post would be eligible for re-evaluation.

Disclosure and Barring Service (DBS)

This post is subject to a satisfactory enhanced Disclosure and Barring Service check, which will disclose all cautions, reprimands and warnings as well as convictions. In addition to completing this application form, you are required to provide us with details of all spent and unspent convictions. Please send this information to us under separate, confidential cover to the Chief Executive Officer. Remember to include your name, address and the position for which you are applying. We guarantee that the information you provide will be used fairly and will only be seen by those who need to see it as part of the recruitment process.

A criminal record will not necessarily bar you from the advertised position. This will depend on the nature of the position and the circumstances and background of your offences. However, failure to reveal this information could lead to the withdrawal of an offer of employment or disciplinary action.

Equal Opportunities

All employees have a responsibility to understand and abide by the obligations laid down in the organisation's equal opportunities policies.

Health and Safety

All employees have responsibility for their own health and safety and for that of others who may be affected by their acts or omissions. Staff members are required to adhere to all health and safety regulations, guidance and procedures at all times.

Confidentiality

All employees are expected to respect confidentiality in relation to Age UK South Gloucestershire business, client and service user data.

Person Specification

Essential Criteria

- Experience of using a person-centred or guided conversation approach to identify needs, goals and outcomes
- Ability to interpret and explain complex information clearly and accurately to a range of audiences
- Excellent listening skills and the ability to demonstrate empathy, tact and sensitivity
- Confidence supporting people face-to-face, by telephone, online and by email
- Strong organisational, planning and time management skills
- Experience of maintaining accurate records and client management systems
- Experience of collecting, monitoring and reporting performance or outcome data
- Ability to analyse information and produce clear written reports
- Ability to build effective relationships with external organisations and referral partners
- Experience of supporting the development or delivery of projects, services or new initiatives
- Ability to work independently, use initiative and manage competing priorities
- Understanding of confidentiality, data protection and information governance requirements
- Understanding of safeguarding responsibilities and recognising safeguarding concerns
- Understanding of the Mental Capacity Act and person-centred practice

Desirable Criteria

- Knowledge of at least two of the following: pension products and retirement planning, budgeting and personal financial planning, adult social care and care planning, housing options and support services for older people
- Experience of providing information, guidance, advice or signposting services
- Experience of promoting services through networking, events, presentations or community engagement activities
- Experience of working with older people

- Awareness of statutory, voluntary and community services available to older people in South Gloucestershire
- Experience of working within information and advice, financial services, pensions, housing, adult social care or community services
- Knowledge of Age UK Information and Advice resources

Essential Personal Qualities

- Passionate about supporting people to make informed decisions and plan positively for the future.
- Able to work collaboratively whilst taking ownership of a new area of work. Proactive and motivated, with a willingness to help develop and improve services.
- Professional, approachable and able to build trust with a wide range of people.
- Committed to equality, diversity and inclusion.

How to Apply

If you are interested in becoming our new Mid-Retirement Support Navigator, please download an application form from our website:

www.ageuksouthglos.org.uk

Completed application forms should be submitted via email or post
FAO Tracy Marshall OfficeManager at:

hr@ageuksouthglos.org.uk

or

Age UK South Gloucestershire,
67 High Street, Thornbury, Bristol, BS35 2AW

Please ensure you have also completed the Equality and Diversity Monitoring section of the application form. The information on the form will be treated as confidential, and used for reporting purposes only. The form will be kept separate and will not form part of the application process.

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Interviews:

To be held within 2 weeks of closing date

For general information on Age UK South Gloucestershire or if you have specific questions about the role, please contact Tracy Marshall (details above) and she will be happy to arrange for an informal discussion with the appropriate member of staff.



**Age UK Charity
Quality Standard**



