



The Aged Care Efficiency Index, Edition 2

Wednesday 30 September 2026
12:00 pm to 12:45 pm AEST



Acknowledgement of Country

We acknowledge the Traditional Custodians of country throughout Australia and their connections to land, sea and community.

We pay our respects to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

Agenda

1. Welcome
2. Your ratings
3. The FY26 ACE Index
4. Q&A
5. Close



A man with dark hair, wearing a dark suit jacket over a light-colored shirt, is sitting at a desk in an office. He is smiling and looking towards the camera. His right hand is on a laptop keyboard, and his left hand is on a computer mouse. A large monitor is visible in the background, displaying some data or code. The text "Questions welcome in the chat." is overlaid on the left side of the image.

Questions
welcome in the
chat.

FY26 was the transition year: four months under the old Act, eight under the new

Edition 2 reads the period from the October 2024 baseline to 30 June 2026. FY27 is the first full year of the reformed settings.



Sources: Department of Health, Disability and Ageing; Aged Care Act 2024; care minutes supplement guidance, 2026. Mirus Australia analysis.

Same ACE, a name that matches the method: the Aged Care Efficiency Index

Edition 1 was published as the Aged Care Effectiveness Index. From Edition 2, ACE stands for Aged Care Efficiency.

The discretionary space above the floor: efficiency

How well each provider turns its funding into care, quality and a sustainable business. This is where providers genuinely differ, and what the ACE Index measures.

The regulated floor: effectiveness

Accreditation, the strengthened Quality Standards and care minute targets set the standard every provider must meet.

Built into the method

- 1 The efficient care frontier**
Retaining care surplus while holding quality and compliance.
- 2 The efficient accommodation frontier**
A hotel services and accommodation surplus while holding occupancy and consumer satisfaction.

Efficiency means delivering the required care outcomes sustainably, not at least cost.

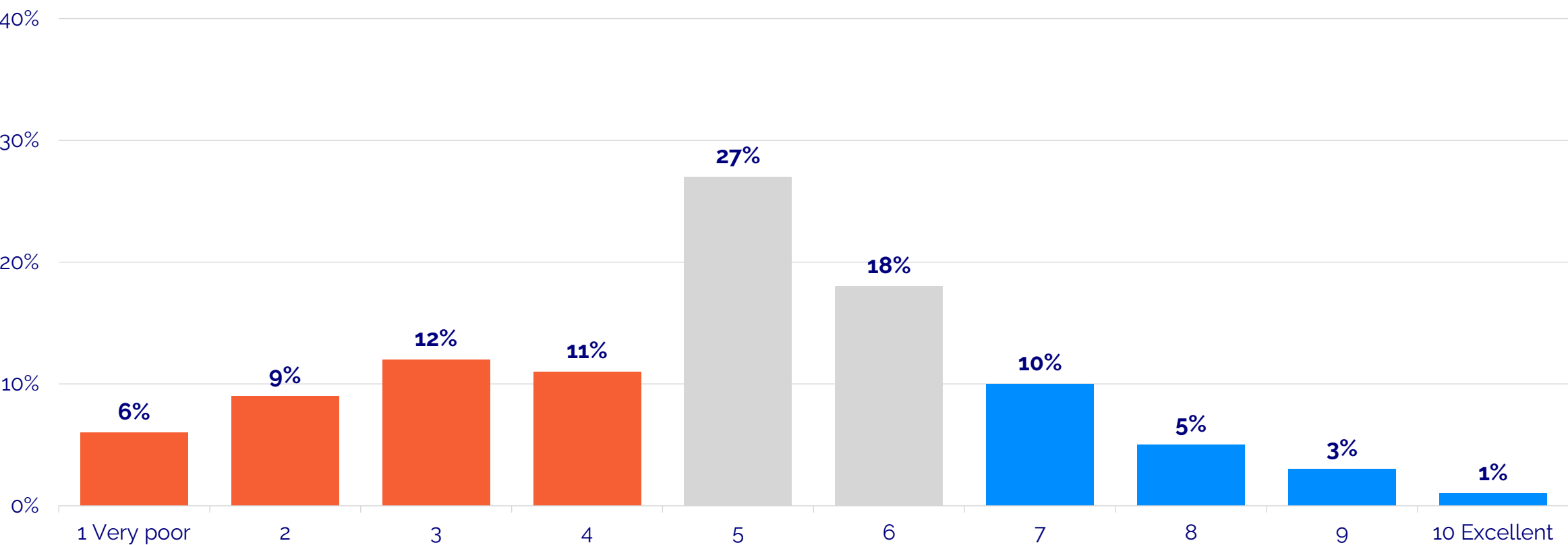
Source: ACE Index scoring methodology, Mirus Australia.



Your ratings

How would you rate the aged care sector's current performance on financial sustainability?

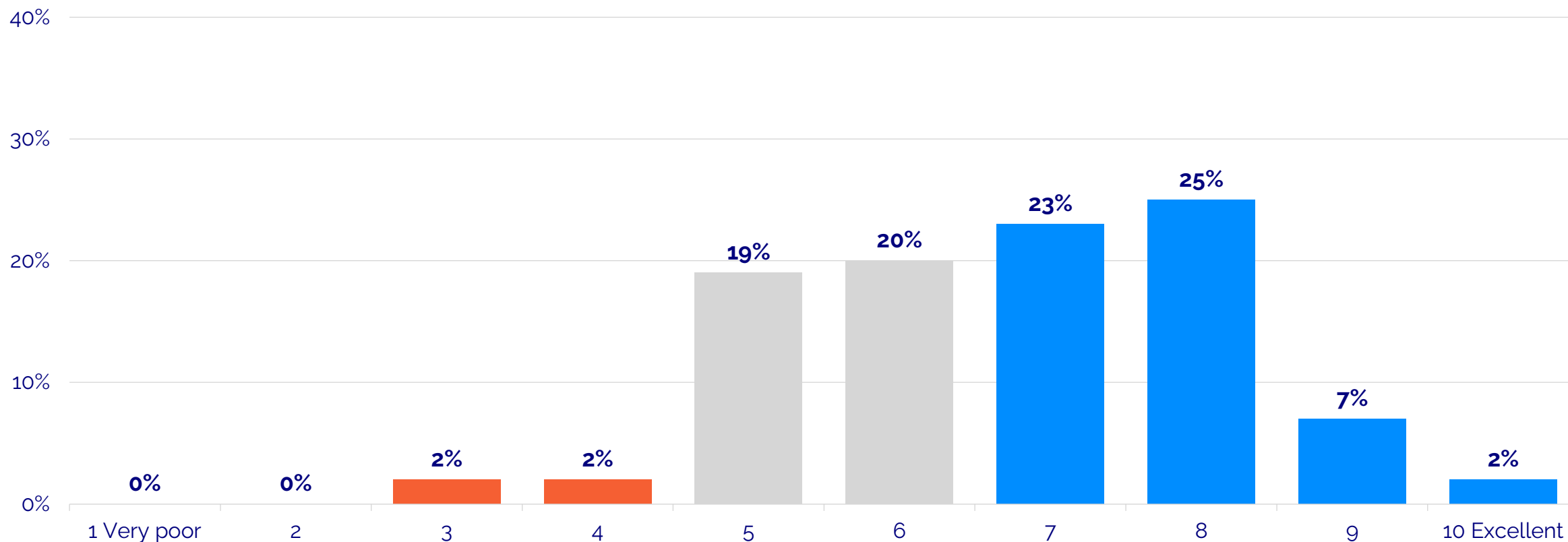
How providers rate the sector's financial sustainability. Average 4.8 out of 10; 37% poor, 44% middling, 19% strong



Source: ACE Index Edition 2 webinar registration poll, September 2026. n = 113; duplicate submissions removed (latest kept). Bars coloured by band: poor 1–4 (orange), middling 5–6 (grey), strong 7–10 (blue).

How would you rate the aged care sector's current performance on quality?

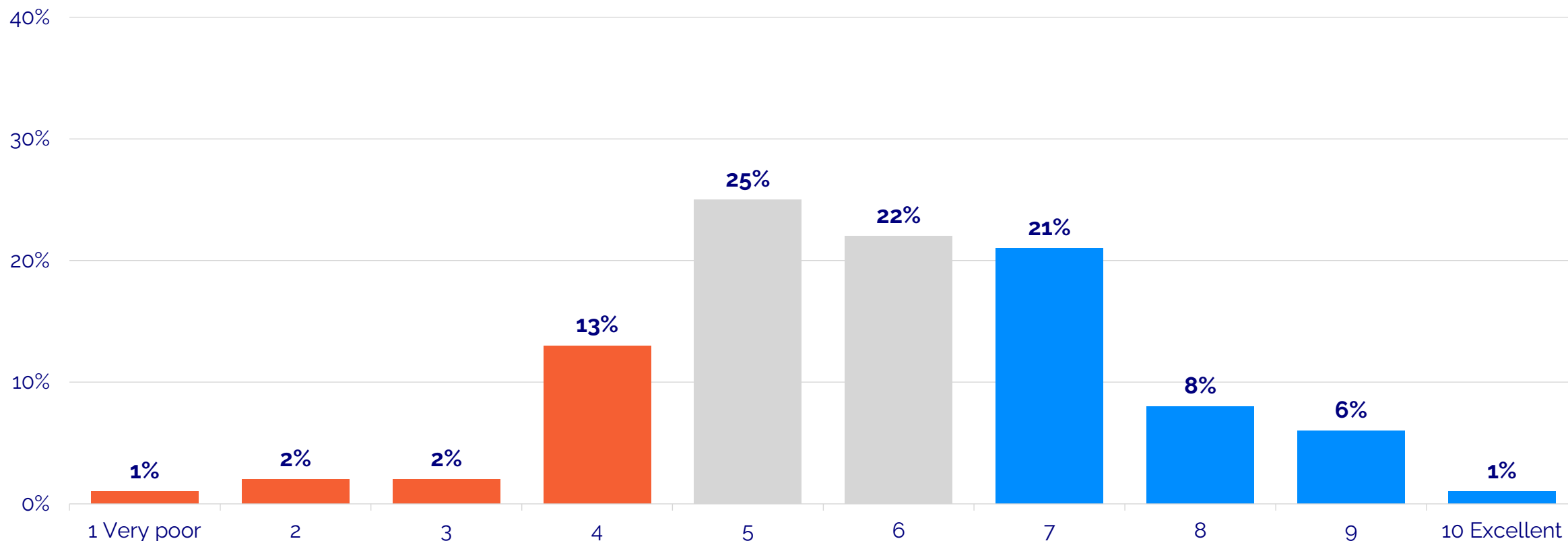
Average 6.7 out of 10; 4% poor, 39% middling, 58% strong



Source: ACE Index Edition 2 webinar registration poll, September 2026. n = 111; duplicate submissions removed (latest kept). Bars coloured by band: poor 1-4 (orange), middling 5-6 (grey), strong 7-10 (blue).

How would you rate the aged care sector's current performance on resourcing (workforce & care minutes)?

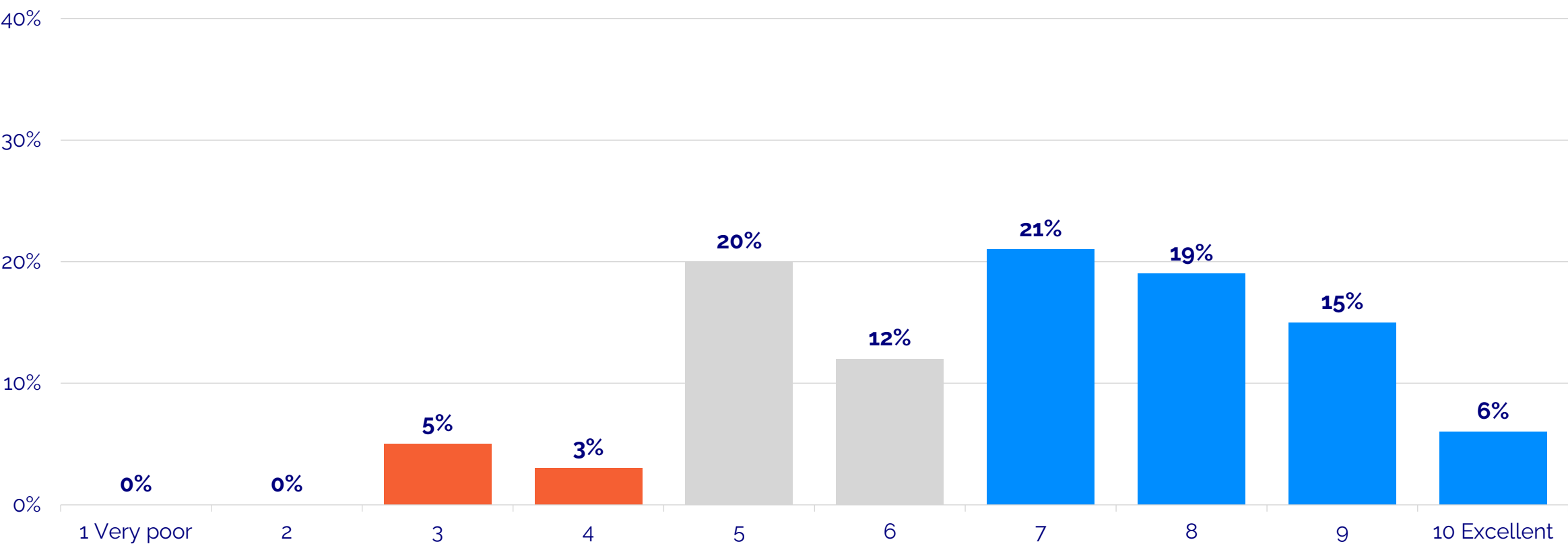
Average 5.9 out of 10; 17% poor, 46% middling, 36% strong



Source: ACE Index Edition 2 webinar registration poll, September 2026. n = 110; duplicate submissions removed (latest kept). Bars coloured by band: poor 1-4 (orange), middling 5-6 (grey), strong 7-10 (blue).

How would you rate your own organisation's current performance on resourcing?

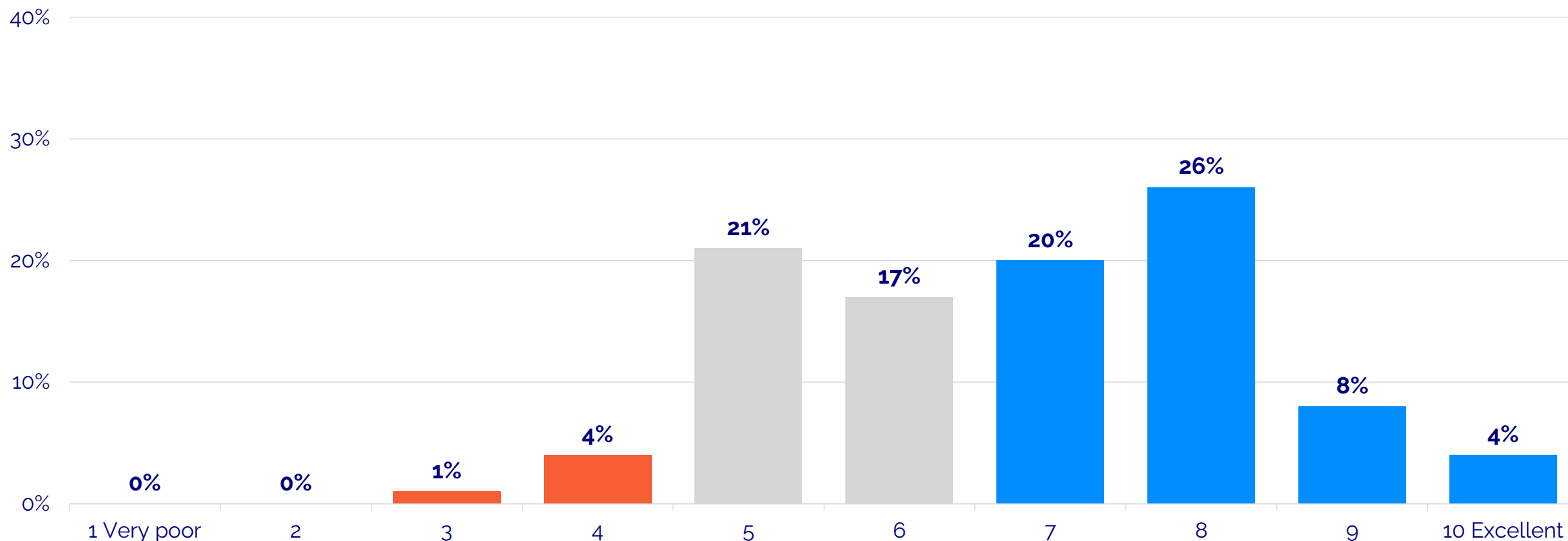
Average 6.9 out of 10; 7% poor, 32% middling, 61% strong



Source: ACE Index Edition 2 webinar registration poll, September 2026. n = 111; duplicate submissions removed (latest kept). Bars coloured by band: poor 1-4 (orange), middling 5-6 (grey), strong 7-10 (blue).

How would you rate the aged care sector's current performance on consumer experience?

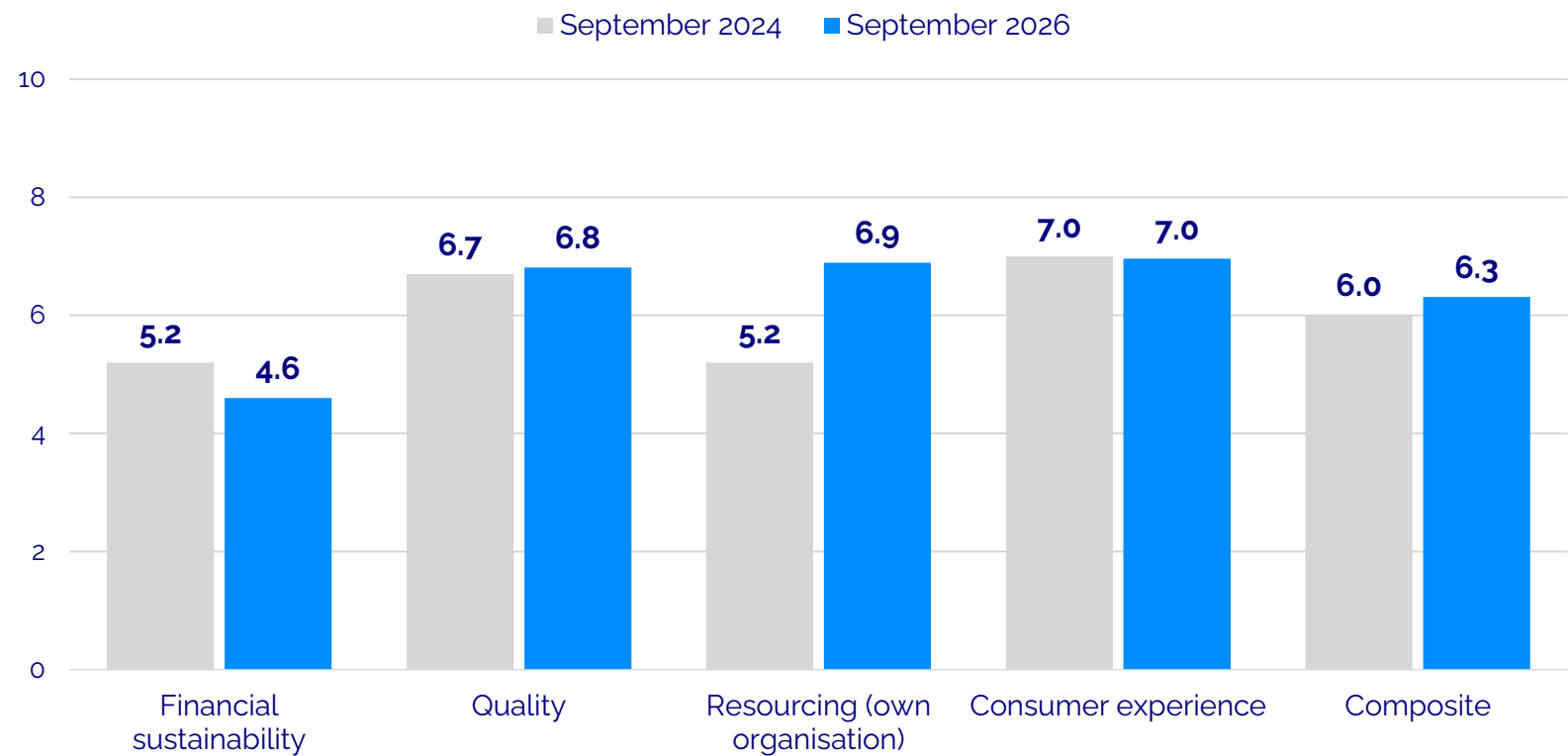
Average 6.8 out of 10; 5% poor, 38% middling, 57% strong



Source: ACE Index Edition 2 webinar registration poll, September 2026. n = 105; duplicate submissions removed (latest kept). Bars coloured by band: poor 1–4 (orange), middling 5–6 (grey), strong 7–10 (blue).

Two years on, you are harder on finances and far more confident on resourcing

Sector leaders' average rating out of 10, September 2024 and September 2026



-0.6

Financial sustainability: the only pillar you rate lower than in 2024

+1.7

Resourcing, rating your own organisation, the question asked in 2024

6.0

Your rating of the sector's resourcing, almost a point below your own organisation

Sources: ACE Index Edition 1 webinar poll, September 2024; ACE Index Edition 2 webinar registration poll, September 2026 (n = 76 to 80). Composite is the unweighted average of the four questions asked in both years. Different respondent groups: read as sentiment, not measurement.



The FY26 ACE Index

Out of 10, across four equal-weighted pillars

Four pillars, scored from data the sector already lodges or government publishes

Edition 2 is the first edition calculated directly from the published ACE scoring methodology.

1

Financial sustainability

Average of two business units, each on EBT per resident per annum:

Provision of care: $\text{EBT} \div \$4,000 \times 10$

Hotel services and accommodation: $\text{EBT} \div \$16,000 \times 10$

2

Quality

Quality Indicators star rating plus Compliance star rating, giving a score from 2 to 10.

3

Resourcing

Staffing star rating, reflecting care minutes delivered against each home's RN and total targets, doubled to a score from 2 to 10.

4

Consumer satisfaction

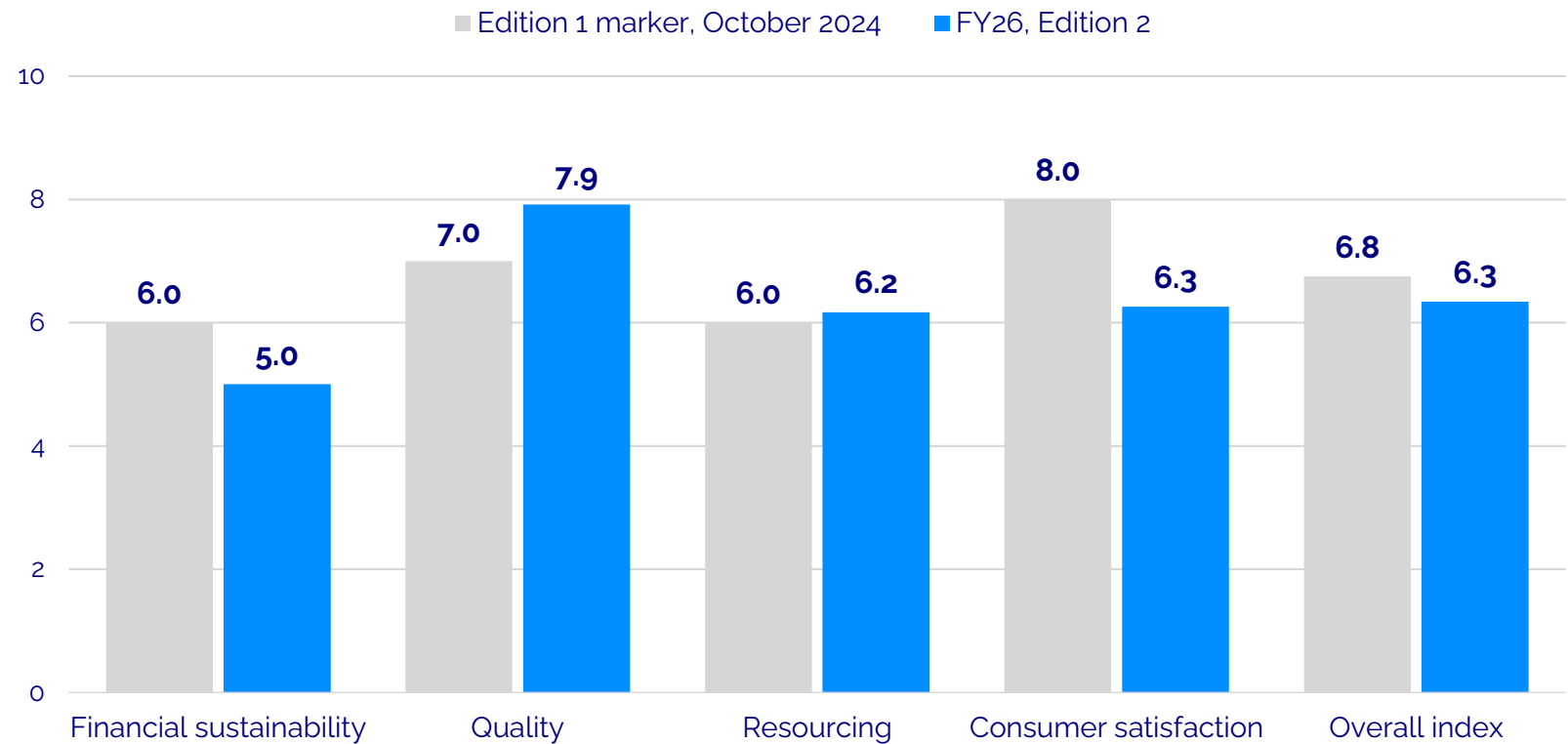
Average of the Residents' Experience star rating doubled, and occupancy scored from 85% (0) to 100% (10).

Overall index: the unweighted average of the four pillars. Sub-scores run from 0 to 10.

Source: ACE Index scoring methodology, Mirus Australia.

The FY26 ACE Index scores 6.3 out of 10

Pillar scores out of 10. Edition 1 appears once, as an orientation marker: it was an expert rating, where Edition 2 is calculated.



6.3

out of 10, FY26
Edition 1 marker: 6.8

The overall score moved a little.
The order of the pillars
underneath it moved a lot.

Sources: Mirus ACE Index dataset, Q4 FY2025–26; ACE Index Edition 1, October 2024. Overall index is the unweighted average of the four pillars.

The two pillars at the top have swapped places

Pillars ranked by score, Edition 1 (October 2024) and FY26

Edition 1, October 2024

1 Consumer satisfaction 8

2 Quality 7

3= Resourcing 6

3= Financial sustainability 6

FY26

1 Quality 7.9

2 Consumer satisfaction 6.3

3 Resourcing 6.2

4 Financial sustainability 5.0

What the inversion means

What the regulator measures is now the sector's strongest suit: compliance is close to universal.

What residents and the market tell us has slipped to second.

Compliance has become the floor almost every provider stands on. The differences between providers now sit above it, in efficiency.

Sources: Mirus ACE Index dataset, Q4 FY2025–26; ACE Index Edition 1 ratings. Resourcing and financial sustainability were level at 6 in Edition 1.

Financial sustainability, 5.0: care at the ceiling, accommodation at the floor

EBT per resident per annum by business unit, Q4 FY2025–26, and the resulting sub-scores

Provision of care

\$22,879

EBT per resident per annum

Sub-score 10.0

$\$22,879 \div \$4,000 \times 10 = 57.2$, capped at 10

Hotel services and accommodation

-\$4,595

EBT per resident per annum

Sub-score 0.0

$-\$4,595 \div \$16,000 \times 10 = -2.9$, floored at 0

What it means

The care margin is carrying the building.

Everyday living and accommodation remain in structural deficit.

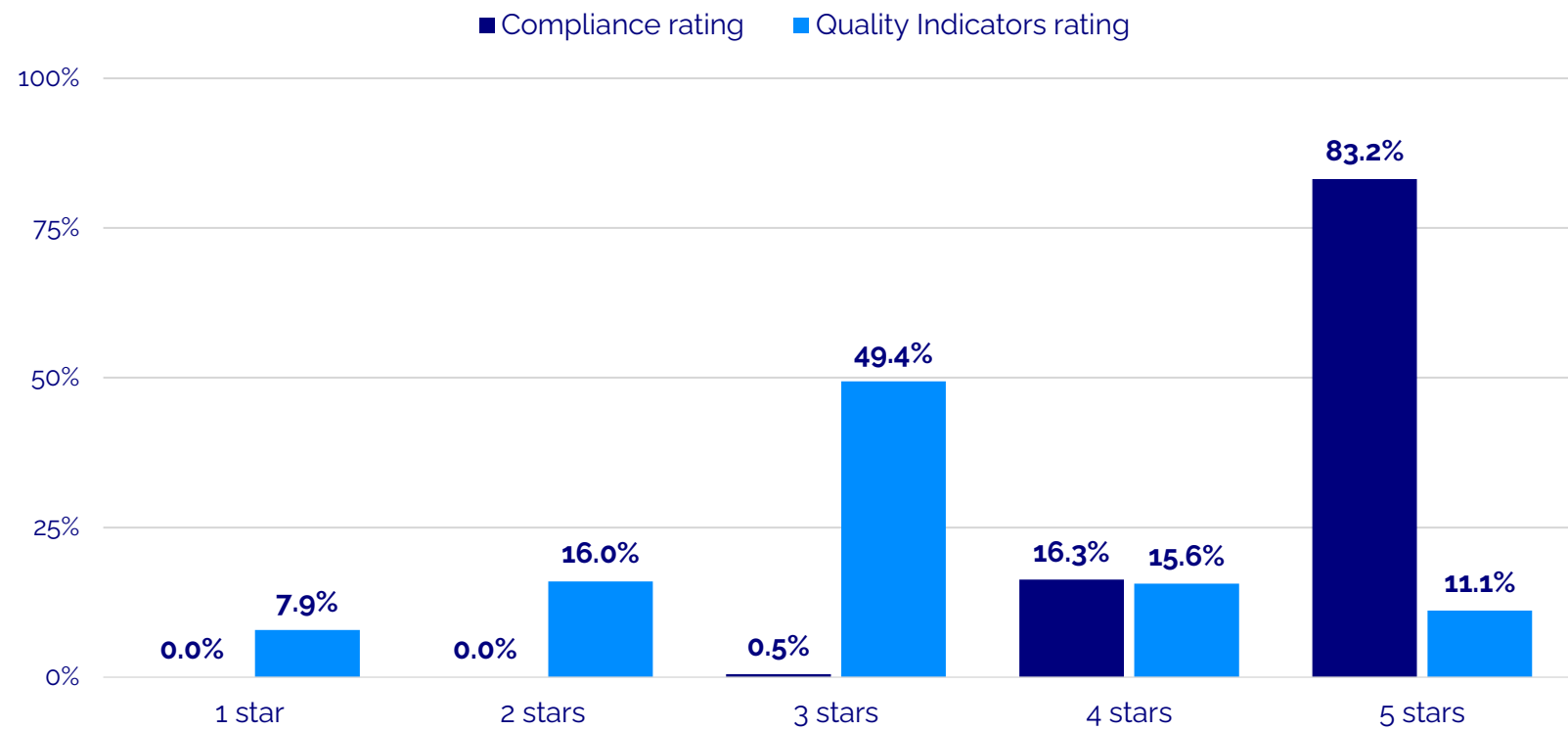
FY27 is the first full year of RAD retention, the Higher Everyday Living Fee and revised contributions: in effect, their report card.

Pillar score: $(10.0 + 0.0) \div 2 = 5.0$

Source: Mirus ACE Index dataset, Q4 FY2025–26. Edition 2 floors the accommodation sub-score at zero; without the floor this pillar scores 3.6 and the overall index 6.0. The care sub-score is capped at 10.

Quality, 7.9: compliance is close to universal, clinical outcomes are mid-table

Share of homes by star rating, latest rating per home. Pillar = Quality Indicators star + Compliance star.



4.86

Compliance star, average

3.06

Quality Indicators star, average

The 1.8-star gap between the two measures is the finding. The strengthened Standards will be judged on whether they move the clinical distribution.

Distributions: Star Ratings, latest per home, January–March 2026 extract (compliance 2,422 homes; Quality Indicators 2,502 homes). Scores: Mirus ACE Index dataset, Q4 FY2025–26. The Compliance rating was rebased against the strengthened Standards from 1 November 2025; treat as provisional.

Resourcing, 6.2: the average home is above target, the average star is barely three

Care minutes delivered against each home's targets, average across homes, Q4 FY2025–26



What it means

When the average home is above target but the average star is about three, the shortfall sits in a tail of homes.

Three stars now require both targets: the Staffing rating was recalibrated from 1 October 2025.

The next two slides show where the tail sits.

3.085

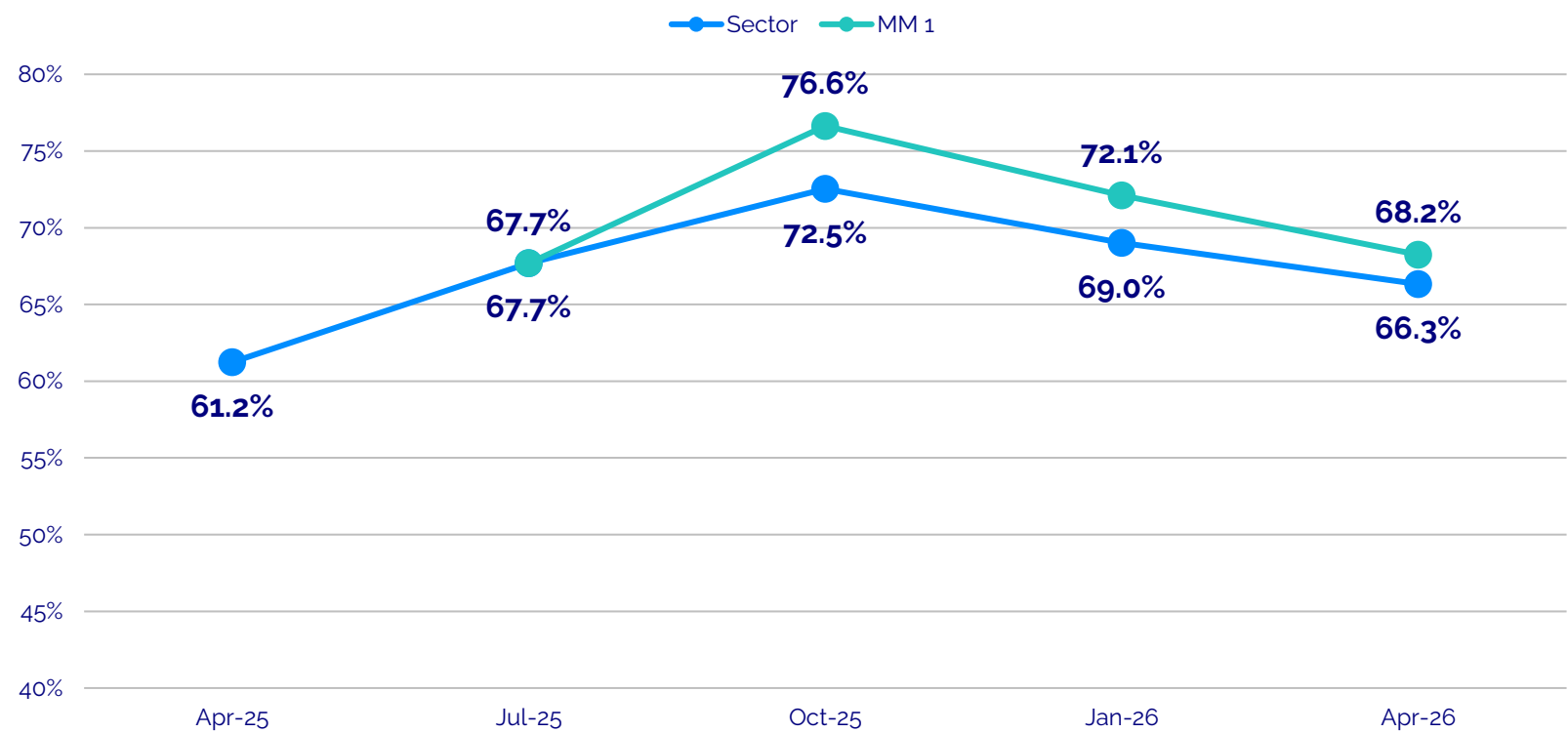
Average Staffing star, doubled:

$3.085 \times 2 = 6.17$, the pillar score

Source: Mirus ACE Index dataset, Q4 FY2025–26. Attainment is the average across homes; the Staffing star reflects each home's position against both targets.

The sector's own QFR data: 68.2% of MM 1 homes now meet both care minute targets

Share of homes meeting both RN and total care minute targets, by quarter



68.2%

MM 1 homes meeting both targets, April–June 2026, against the as a whole 66.3%

451 of 519

Non-compliant MM 1 homes that miss on total minutes; 68 miss on RN alone

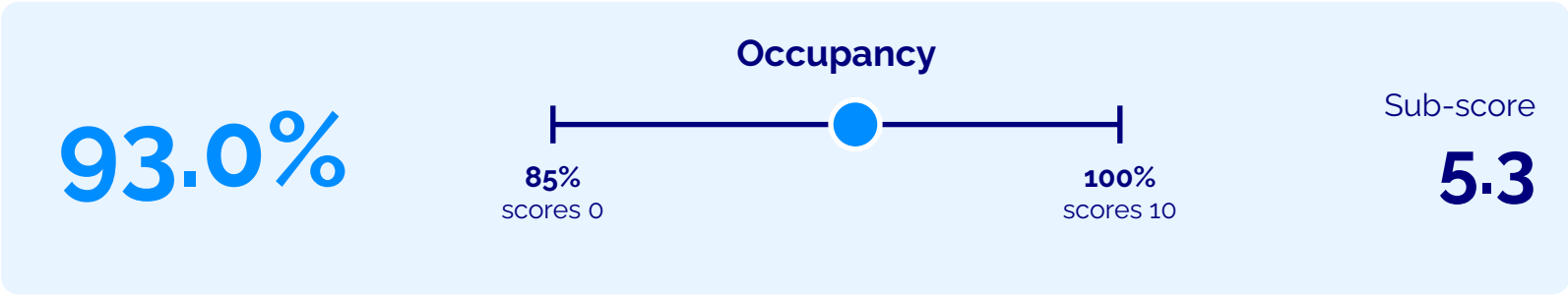
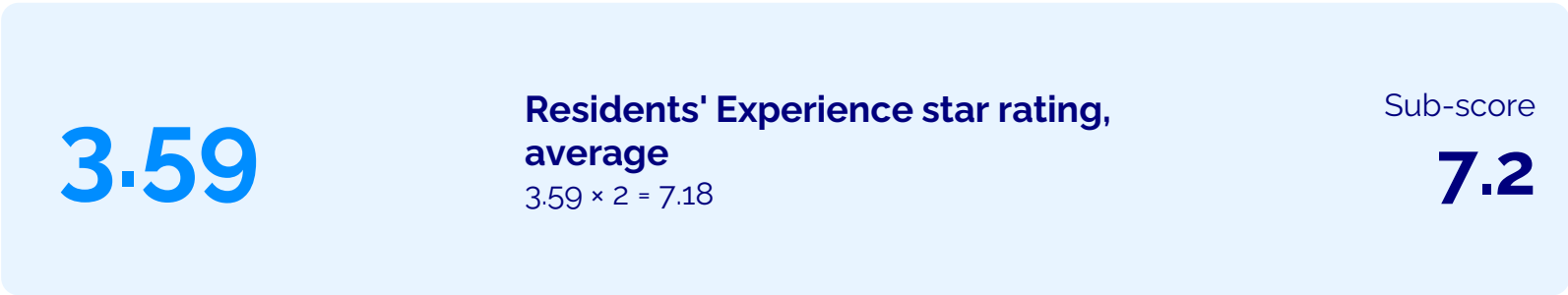
73%

Of the homes still short, the share within five minutes of both targets

Sources: Care Minutes in Residential Aged Care data (sector, published quarters); Mirus benchmarking cohort, April–June 2026 QFR lodgements and April–June 2025 position. The January–March easing reflects rising acuity-adjusted targets. Cohort members opt in: a forward indicator on an identical basis, not the sector print.

Consumer satisfaction, 6.3: residents' view holds at 7.2, occupancy scores 5.3

Pillar = average of the Residents' Experience star $\times 2$ and occupancy scored from 85% (0) to 100% (10)



Pillar score: $(7.18 + 5.33) \div 2 = 6.26$, reported as 6.3

What it means

Your 7.0 rating sits right alongside residents' own view.

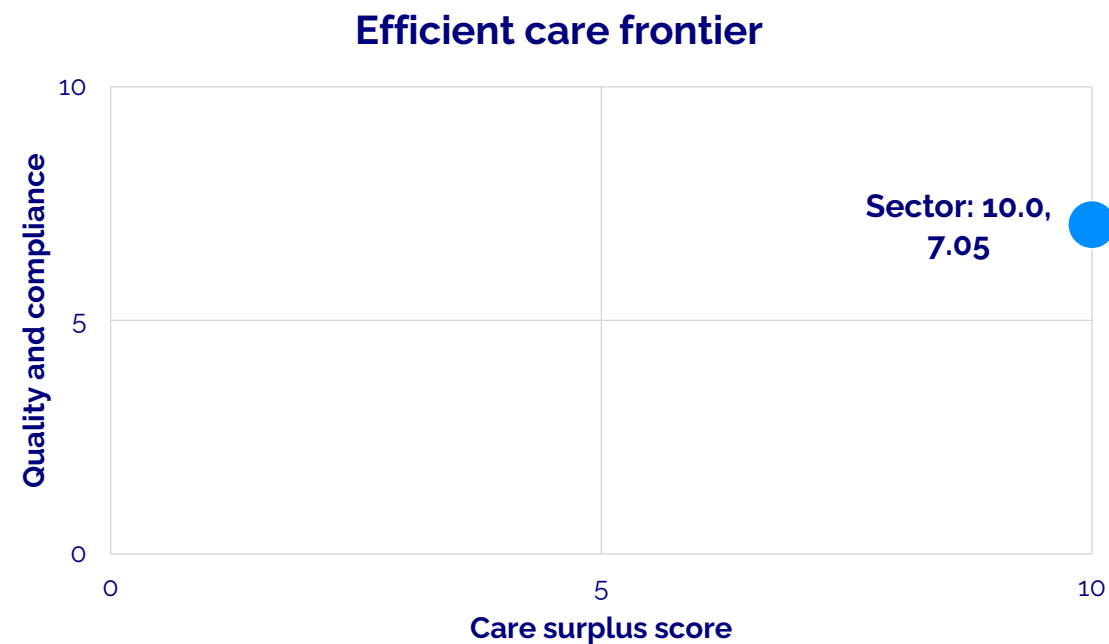
Only 6% of homes hold a five-star residents' experience rating.

The published survey is annual, sampled and resident-only. Your own continuous feedback is the leading indicator.

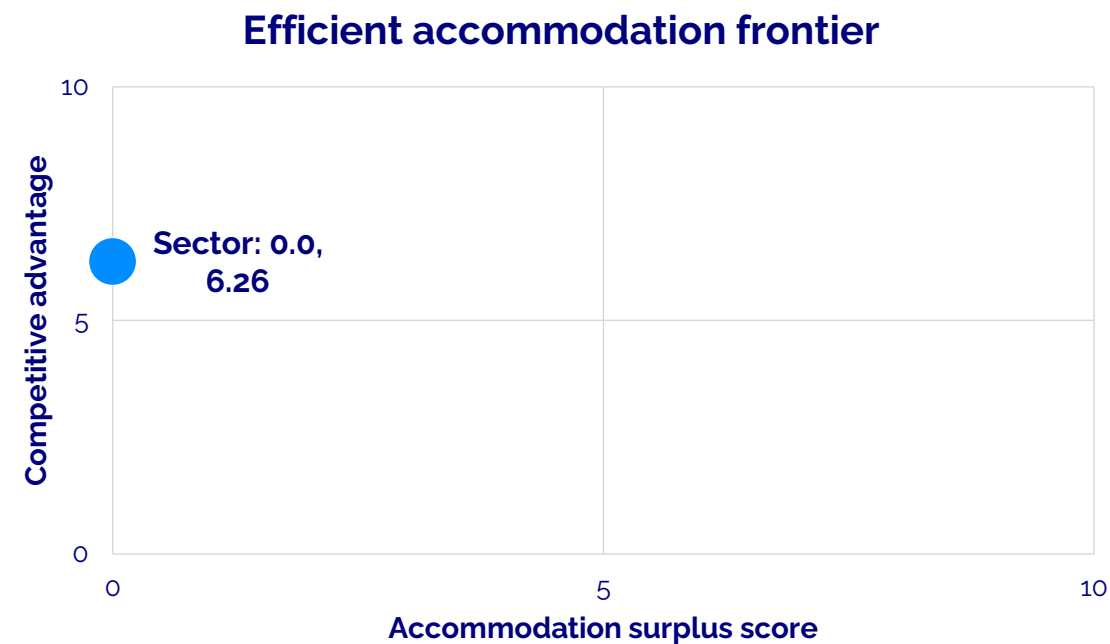
Sources: Mirus ACE Index dataset, Q4 FY2025–26; five-star share from Star Ratings, January–March 2026 extract. Resident contributions, the third input in the method, are not held at industry level, so this pillar is directional.

On the two efficiency frontiers, the sector sits at opposite edges

Sector position on the two ACE efficiency frontiers, Q4 FY2025–26, each axis 0 to 10. Top right is where surplus and quality coexist.



Care: maximum surplus, with quality and compliance at 7.05. The question is what that surplus funds.

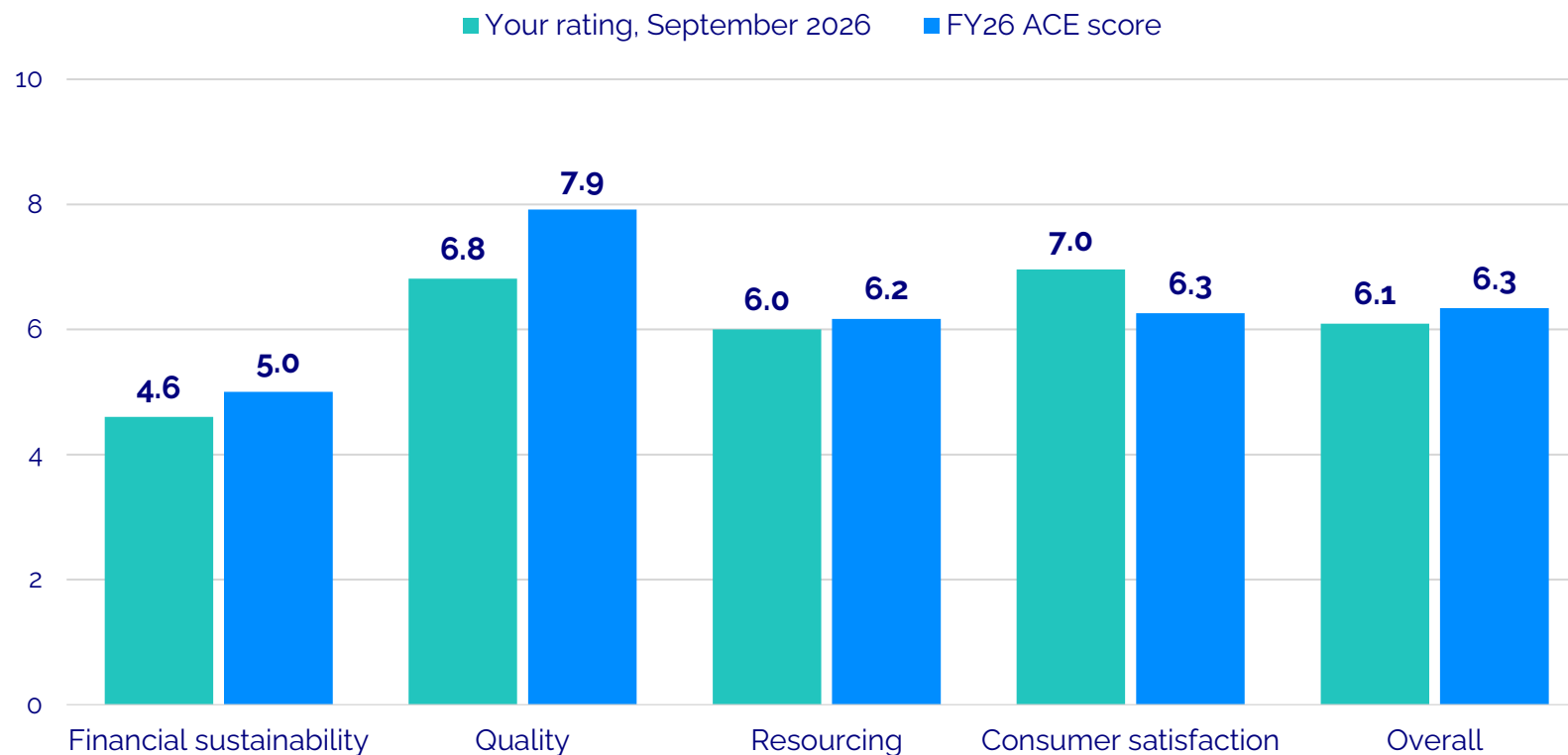


Accommodation: no surplus, with competitive advantage at 6.26. Price and product have not yet found equilibrium.

Source: Mirus ACE Index dataset, Q4 FY2025–26. Quality and compliance = average of the Quality and Resourcing pillars; competitive advantage = the Consumer satisfaction pillar.

Your ratings put consumer experience first. The data now puts quality first.

Your ratings (September 2026) against the FY26 ACE scores, out of 10



-1.1

Quality: you are harder on the sector than the data

+0.7

Consumer: you are kinder than the data

Within 0.4

Financial sustainability and resourcing: close to the data

Sources: ACE Index Edition 2 webinar registration poll, September 2026 (n = 76 to 80); Mirus ACE Index dataset, Q4 FY2025–26. Your overall rating is the unweighted average of the four sector questions.

Showing our workings: the choices that move the scores

Every choice that moves a score is disclosed. These are the ones that matter most.

Decisions in this edition

- **Accommodation floored at zero.**
Without the floor, financial sustainability is 3.6 and the overall index 6.0.
- **Occupancy scored on an absolute scale.**
85% = 0 and 100% = 10, so the sector can be read against itself. The 85% anchor is a judgement.
- **Residents' Experience scored as star × 2.**
Consistent with the resourcing convention.
- **Resident contributions not included.**
Not held at industry level, so the consumer pillar is directional.

What we will sharpen for Edition 3

- **Recalibrate the care threshold.**
At a raw 57.2, the \$4,000 threshold no longer separates good from exceptional.
- **Publish quartiles, not only averages.**
The tail carries the story, particularly in resourcing.
- **Separate metropolitan and regional homes.**
The care minutes supplement applies only to MM1 homes.
- **Reconcile against full-year sector data.**
When the Department's Q4 Quarterly Financial Snapshot publishes.

Source: ACE Index Edition 2 scoring record, Mirus Australia.

What the inversion means for your organisation

Compliance is the regulated floor. The differences between providers, and the opportunities, sit above it.

01

**Compliance is the floor,
not the differentiator**

With compliance close to universal, boards need the clinical indicators to see where they actually stand.

02

**The care margin is
carrying the building**

Know what your care surplus funds, and how long it can carry hotel services and accommodation.

03

**The next gain is
conversion, not
headcount**

Cost per delivered minute, agency premium, non-worked hours and shift design now separate homes.

04

**Your leading indicator
is your own feedback**

The published experience rating is annual and sampled. Continuous feedback shows change inside the year.

Questions every board should be asking in FY27

No provider is publicly benchmarked. The point is the boardroom question: how do we compare, and do we have work to do?

Overall

Where would we score on each ACE pillar, and which one is our binding constraint?

Quality

Does our compliance rating tell the same story as our quality indicators, and which one does the board manage to?

Resourcing

What does a delivered minute cost us, home by home?

Financial sustainability

What does our care surplus fund, and what is our plan for everyday living and accommodation margins in FY27?

Resourcing

Is our care minute position a delivery story or a target story?

Consumer satisfaction

If the published rating is a year old when it arrives, what is our leading indicator, and how often do we see it?

What happens next

The sector's own evidence base gets stronger with every home added.

1

The Edition 2 report

The full report will be published soon..

2

Your own ACE position

Every Mirus QFR Board & Benchmarking Report scores your organisation on the same four pillars, from data you already lodge.

3

Join the benchmarking cohort

Contribute your QFR data and help the sector measure itself on its own evidence.

Talk to us about your ACE position or joining the cohort: mirusaustralia.com

A man with dark hair, wearing a dark suit jacket over a light-colored shirt, is sitting at a desk. He is smiling and looking towards the camera. His right hand is on a laptop keyboard, and his left hand is on a computer mouse. A large monitor is visible in the background, displaying some data or code. The text "Questions welcome in the chat." is overlaid on the left side of the image.

Questions
welcome in the
chat.



Join Mirus Benchmarking

See how your organisation compares.

Your funding, occupancy and resident mix, set against providers like you. Free, with no end date.





Contribute your QFR data

Interested to contribute your QFR data to our benchmarking behind the ACE Index?

Register your interest at marketing@mirus.group

Contact us



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