Case Study

operations • core platforms

Hudson Valley Credit Union modernizes its tech foundation to support growth and innovation

jack henry

Hudson Valley Credit Union

Address
PO Box 1071
Poughkeepsie, NY 12602

Phone
845-463-3011

Website
hvcu.org

Assets
$8.07B

Members
388,883

Founded
1963

Number of Branches
40

Software Solutions
Symitar® EASE™

the challenge:

Turning a Technology Crossroads Into a Strategic Opportunity

Hudson Valley Credit Union found itself at a critical juncture when its on-premises core platform environment approached a significant hardware refresh. Continuing to maintain an internal data center would require a substantial capital investment – along with ongoing time and resources that leadership believed could be better spent supporting strategic initiatives and enhancing the member experience.

"When we evaluated the investment required for a hardware refresh, we realized the bigger question wasn't whether we could continue managing our own infrastructure – it was whether that's where we wanted to focus our time, resources, and expertise," says John Fede, Chief Information Officer at Hudson Valley. "We wanted our team focused on initiatives that create value for our members, not maintaining a data center."

Rather than simply replacing aging infrastructure, Hudson Valley's leadership team viewed the situation as an opportunity to rethink how technology should support the organization's long-term goals. Faced with a costly upgrade, Fede and his team sought a modern approach that would reduce operational complexity, strengthen resilience, and allow internal resources to focus on higher-value work.

the solution:

Aligning Operations with Priorities

To support its long-term vision, Hudson Valley chose to migrate its core environment to Symitar® EASE™, the private cloud-based delivery model from Jack Henry®.

The move enabled the credit union to transition away from managing day-to-day infrastructure operations and instead focus on initiatives that directly support members and organizational growth.

“The bigger question wasn’t whether we could continue managing our own infrastructure – it was whether that’s where we wanted to focus our time, resources, and expertise. **We wanted our team focused on initiatives that create value for our members**, not maintaining a data center.”

John Fede
Chief Information Officer,
Hudson Valley Credit Union

By adopting a cloud-based operating model, Hudson Valley reduced the burden of maintaining hardware while gaining access to a secure, scalable environment managed by a trusted provider.

Key objectives behind the migration included:

- **Strengthening Operational Resilience:** Shifting responsibility for platform availability, patching, security, and lifecycle management to Jack Henry helped reduce infrastructure risk and increase operational consistency.
- **Redirecting Resources Toward Strategic Priorities:** Moving away from a costly hardware refresh eliminated significant capital expenditures and allowed investments to remain focused on business priorities.
- **Empowering Teams to Focus on Member Value:** By reducing time spent on routine infrastructure management, internal teams could dedicate more attention to innovation, service improvements, and member-focused initiatives.

the result:

A Stronger Foundation for Growth, Efficiency, and Innovation

Hudson Valley completed its migration to EASE at the end of 2024. Thanks to extensive planning, testing, and collaboration, leadership described the transition as a “non-event” – allowing the organization to quickly realize the benefits of a modernized technology foundation.

The results have extended well beyond infrastructure management, helping the credit union improve operational efficiency, support strategic growth initiatives, and position itself for continued innovation.

- **Accelerated Innovation**
  By offloading routine maintenance activities such as patching, monitoring, and capacity management, Hudson Valley’s IT team gained more time to focus on initiatives that directly benefit members and support organizational goals.

By offloading routine maintenance activities such as patching, monitoring, and capacity management, Hudson Valley's IT team gained more time to **focus on initiatives that directly benefit members and support organizational goals.**

The shift has enabled the technology team to spend less time maintaining systems and more time advancing projects that create meaningful business value.

- **Supporting Growth Through Seamless M&A Execution**
  As Hudson Valley pursued significant growth initiatives in 2024, having its core environment already operating on EASE provided a stable, standardized foundation for complex conversion activities.

  The credit union's expansion efforts included the divestiture of eight Berkshire Bank branches and the acquisition of Catskill Hudson Bank. A modernized operating environment helped support the onboarding of 11 new branches by:

  » Reducing technical variability during data conversions.

  » Enhancing predictability and control throughout integration efforts.

  » Leveraging proven expertise from Jack Henry Professional Services to streamline implementation activities.

  The result was a more consistent and manageable approach to executing complex organizational growth initiatives.

  "Growth initiatives such as acquisitions and branch integrations come with enough complexity on their own," says Fede. "Having a stable, standardized environment allowed us to approach those projects with greater confidence and predictability."

- **A Future-Ready Foundation**
  With a modernized technology foundation in place, Hudson Valley Credit Union is well positioned to take advantage of additional cloud-enabled services and future innovations as business needs evolve.

  The credit union now has the flexibility to scale operations, adopt new capabilities more efficiently, and continue aligning technology investments with strategic objectives.

The credit union now has the **flexibility to scale operations**, adopt new capabilities more efficiently, and continue aligning technology investments with strategic objectives.

industry advice:

Collaborate with a Trusted Provider

According to Fede, successful modernization initiatives begin with a clear understanding of the outcomes an organization is trying to achieve.

"Modernization works best when you standardize on a platform, simplify integrations, and shift routine operational responsibilities – and the associated risk – to a provider that runs the environment at scale, so your internal teams can focus on differentiating work," says Fede.

He encourages organizations to start by defining their desired business outcomes – whether that's improving speed, strengthening security, enhancing member experiences, or supporting growth – and then evaluate which areas of the technology stack are strategic to own versus where collaboration with a trusted provider can create greater value.

build a stronger foundation for growth

Discover how to modernize your tech ecosystem to strengthen operations and enhance member experiences.

For more information about Jack Henry, visit jackhenry.com.